

HALIFAX

Amazon HQ2 Response

Submitted by: Halifax Partnership
Nova Scotia, Canada | October 16, 2017



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MAKERS UNITE.

Amazon made Seattle what it is today.
And you've been rewarded for that
incredible impact.

Amazon has a vision to evolve, to
invent—to be bold, unflinching pioneers
in the service of your customers.

HQ2 is the next step on your journey.
Halifax is the place to take it.

Amazon Halifax HQ2 isn't a dream to us.
We're ready to make it your reality, and ours.
It's what Halifax has been working towards,
and we want Amazon to be our partner in
the next stage of our city's evolution.

But this isn't about us. It's about you.



October 13, 2017

Dear Jeff:

There is no better place to do business than Canada. In an increasingly complex and uncertain world, Canadians have embraced change while staying true to their values. Canadians are bold innovators and good neighbours, bound together by a spirit of openness and hard work. Every day we demonstrate that these values are sources of strength, and that better is always possible. I can imagine no better place for Amazon to call its second home.

As the first country in the world to adopt a policy of multiculturalism, we have shown time and time again that a country can be stronger not in spite of its differences, but because of them. Diversity is a fact, but inclusion is a choice. Canada has made its decision and our cities have become windows to the world.

We believe in building a clean-growth economy that is as inclusive as it is innovative. We have embraced technological change, while also helping our citizens adapt to the changing nature of work. That is why we have boosted investment in skills and training and introduced an ambitious Innovation and Skills Plan to make Canada a world-leading centre for innovation.

This plan includes actions that will benefit everyone, from students looking to get work experience to adult workers hoping to improve their skills. It delivers simpler and more efficient support to entrepreneurs, while making it easier for both domestic and global companies to invest in Canada and Canadians. We have simplified our business support programs and designed strategic funds to spur innovation and support high-quality business investments. Our government is a ready and willing partner, with the tools already in place, to make bold and strategic investments to create high-quality jobs.

Mr. Jeff Bezos
Amazon
410 Terry Avenue
Seattle, Washington
98109
United States of America

Canada is also committed to reinforcing our strengths in education. Our world-class colleges and universities have graduated the most highly educated workforce within the OECD. In the new economy, however, we recognize that we must also have access to the best talent in the world, wherever it is. We have therefore introduced dedicated immigration services, allowing companies to attract highly-skilled global talent through an expedited review process to quickly recruit for the skills they need.

Canadian cities are progressive, confident, and natural homes for forward-thinking, global leaders. They are consistently ranked as the best places to live, work, and play in the world. They are welcoming, walkable communities with vibrant arts and culture scenes, connected by ever-improving public transportation networks. Canadians enjoy a universal health care system and a robust public pension plan which help support our excellent quality of life and also mean lower costs for employers. Our cities offer welcoming and predictable business environments, with the lowest overall business costs in the G7, underpinned by the soundest banking and legal systems in the world. They are great places to work, invest, and live – all with unmatched global market access and within a short flight of major American cities.

Throughout our history, it is in one another that Canada and the United States have found their closest friend and ally. We enjoy the longest, most peaceful, and mutually beneficial relationship of any two countries in the world. Canada is the largest foreign customer for goods and services made in the United States. We are the number one customer of the majority of American states, and among the top three customers of 48 states. Our economic integration and partnership are unparalleled.

As Amazon decides on the location for its second North American headquarters, I am certain that Canada will stand out. With all our advantages and a government that is willing to invest in the future, the business case is simple.

Amazon has already established roots in Canada, creating thousands of good jobs, and taking advantage of leading technologies in areas such as artificial intelligence and drones. We are grateful for the confidence Amazon has placed in our cities and people. We look forward to growing this partnership.

The Government of Canada is committed to working closely with Canadian cities in providing Amazon a second home. The full support of our government stands behind them.

Please accept my warmest regards.

Sincerely,

A handwritten signature in blue ink, appearing to be "Justin Trudeau", written in a cursive style. The signature is positioned below the word "Sincerely,".



On behalf of all Nova Scotians, I am pleased to support our capital city's response to the Amazon HQ2 RFP. Nova Scotia, Canada, our capital city of Halifax, and supporting communities across our province offer all the advantages for a global player like Amazon—a diverse, creative, and educated workforce, competitive operating costs, a prime geographic location, clear and open immigration pathways, flexible real estate options, and a pool of incentives and programs to support Amazon HQ2.

Nova Scotia has a proven track record working with multinational companies, facilitating their integration, and scale-up needs. We are a location that has achieved many notable innovative firsts with our business partners—we are the first North American beachhead for the world's 10th largest bank—Japan's Mitsubishi Financial (MUFG). And, in 2016, IBM chose Halifax over all other cities in Canada to build their Client Innovation Centre. Just this year, the Pepper Group, headquartered in Australia, chose to expand in Halifax at the conclusion of a worldwide analysis of business jurisdictions.

With the most post-secondary institutions per capita in North America, our early education and K-12 programs focusing on coding and computer science, our green energy initiatives, and the regulatory reform we are undertaking to be among the most business-friendly environments, we would welcome the opportunity for a dialogue with Amazon to further reinforce not only our advantages, but also to define an incentive package for Amazon HQ2.

As Premier of Nova Scotia, Canada, my own commitment to Amazon is also part of our business-friendly environment. On behalf of the Provincial Government of Nova Scotia, we will work with Amazon, our capital city, neighboring communities, our post-secondary universities and colleges, our immigration colleagues, and business community stakeholders to ensure that Amazon is in good company.

My government and Nova Scotians have worked hard to achieve and maintain our strong fiscal position. In September 2017, I tabled my government's balanced budget, which is projecting a surplus of \$131.6 million, with a positive net position of \$21.3 million. Our net debt-to-GDP was reduced to 36.3%, and our budget estimates a further reduction to 35.5%.

Alongside our capital city of Halifax and the Government of Canada, I extend an invitation to Amazon to join us. An invitation to come and share everything our province has to offer as a place to work, live, and thrive. From our bustling city districts to our expansive ocean coastline, Nova Scotia has built on a genuine foundation of hard work, community, and innovation as a path to prosperity. Information technology is a priority sector for Nova Scotia, and we will stand behind our companies that join us in growing the province's global presence in this highly competitive and innovative industry. Nova Scotia will grow side-by-side with the businesses that choose our location to expand their global footprint.

Sincerely,

Honourable Stephen McNeil, M.L.A.
Premier



Amazon HQ2 will transform a city in North America.

As Mayor of Halifax, Nova Scotia, I am steadfast in my belief that the city you should look to next is ours, the economic and cultural heart of the vibrant, unspoiled Canadian East Coast. Every day, Amazon takes possibility and shapes it into new ideas and new technology. Where better to do that than from a place with limitless possibilities?

When we look to the Atlantic that laps our shores, our historic city sees new possibilities. Whether you come as a world-changing company, international student, immigrant entrepreneur, or with little more to invest than hope, Halifax becomes home.

Our harborfront is the headquarters of the international energy company Emera Inc., a new hub for applied ocean innovation, and a science center for curious young minds. It's home to hotels, condos, marinas, parks, and boardwalks, with just enough room for Amazon HQ2 too.

Outside the mouth of the harbor the fastest telecommunications cable to ever cross the Atlantic connects us to Europe with a 2,800 mile subsea link. Just up from the bustling waterfront, the Volta Tech Super Hub (founded by Jevon MacDonald, who sold his two-year-old GoInstant start-up to Salesforce.com) is undertaking a massive expansion, anchoring its position in Halifax's innovation corridor. A block away, Dalhousie University's Innovation and Design in Engineering and Architecture (IDEA) campus is coming out of the ground, beside Halifax's award-winning, technology-enriched Central Library.

While we are proud to be a hard-working port city, Halifax also offers a constant reminder that life is well lived in proximity to the sea. You can hear it in our music, taste it in our food, smell it in the salt air.

Amazon, if you want to give your employees a city to love, to feel a sense of belonging, and pride of place, it's time to come to Halifax.

I would be happy to personally introduce you to our city.

Warm regards,

A handwritten signature in black ink that reads "Mike Savage". The signature is fluid and cursive, with a long horizontal line extending from the end of the name.

Mike Savage
Mayor of Halifax

EXECUTIVE SUMMARY

Amazon HQ2 is a chance to explore, take an uncharted path. For you to make something exceptional. That something exceptional is Halifax. The technology, commercial, and cultural heart of Canada's east coast.

You know what it takes to make great things happen. It takes great people. Engaged, connected, inspired people with bold vision, fearless tenacity, and genuine ideals.

Your pioneers live this reality within Amazon every day. Halifax citizens do too.

We've fostered growth without destroying the essential authenticity of our city. Our evolution has never depended on a single entity working alone. We are collaborative by nature, a united front, because that's the better way to do things. And it means that the lives we build, our neighborhoods and communities, are crafted by the people of our city.

Amazon wants their employees to have a home to love and shape. Halifax is it.

What's more, businesses of all sizes and descriptions are attracted to this place. We have talent and creativity, but without pretension. Our educated, highly-skilled workforce is growing every day and is unwaveringly loyal. We call the east coast home, but effortlessly connect with the world. We have flexible, captivating urban space and a competitive cost of doing business.

No single factor will determine the ideal home for Amazon HQ2. You are looking for the right fit. A combination of competitive business advantages—all together, in one place. This is it. And we couldn't be more ready for you.

The bottom line: **Halifax works.**

Here's what we're bringing to the table:

1.

A perfect fit

Amazon is a global company. Come join a place that is a global citizen. Our culture of respect, peace, order, and good government means diversity flourishes. Ideas and invention thrive. Perspectives and cultures from around the globe are embraced.

We work together to lift each other up, and create environments where business can evolve, innovate, and prosper. Our mayor, premier, government partners, universities, and business community work together regularly, quickly, and effectively to make big things happen in Halifax. Ask companies like IBM, NTT Data, or Irving Shipbuilding how we rally to help companies locate, grow, and succeed in Halifax.

Halifax came together, worked tirelessly, and secured the \$30 billion Canadian shipbuilding contract.



2.

Once-in-a-lifetime location

Amazon's Halifax HQ2 site is like no other in North America. We check every box. Ninety-two acres of central, urban, development-ready oceanfront land. Located next to the major highway system and only 25 minutes from our international airport. With easy access to road, rail, mass transit, and the harbor itself, Amazonians can drive, ride, or even kayak to work. Heating and cooling? No problem. Amazon's waterfront location offers ample opportunity for district energy. And we have plenty of room for Amazon to grow.

Shannon Park is an unparalleled 92-acre oceanfront site in the heart of Halifax primed for Amazon's HQ2.

3.

A \$10 billion advantage

Halifax is the best deal in North America for Amazon HQ2. KPMG's Competitive Alternatives study ranks Halifax 6th out of 108 mature markets for overall business competitiveness. Using KPMG's model, Amazon Halifax HQ2 will save Amazon more than \$10 billion over 10 years compared to Seattle.

Halifax has the lowest cost of labor for every position Amazon needs.

Among 17 North American cities, Halifax has the lowest cost of labor for every position Amazon needs. The average Halifax labor cost advantage ranges from 21% for supply chain logistics coordination to 51% for user support technicians.

* All costs and figures in US dollars unless otherwise noted.

4.

Top talent that stays

The world's most talented, inventive, engaged people want to be in Halifax and make their lives here. We have one of the world's most highly educated and loyal workforces with 36,000+ students enrolled every year at seven post-secondary institutions. Nearly 10,000 graduate with degrees and certificates annually. Nova Scotia has more engineering, applied science, mathematics, and physical science graduates per capita than anywhere else in Canada. Plus modern immigration policies and Canada's open, welcoming values mean the talent pipeline is always working for you, attracting people from around the world.

And given the opportunity to be in this place and work with one of the coolest companies on the planet, you bet people will stick around.

Halifax has exceptionally low employee turnover compared to the US

In the tech sector, it's just 8.6% versus the US average of 33.1%.

More than 50% of our post-secondary population comes from other places. And 70% of them want to stay in Halifax for good.

5.

It's a fact: Halifax makes people happy

The soul of this place speaks to people, draws them in, and brings them home. We have a city that's transforming every day, but has kept the essence of who we are.

Every year, Halifax welcomes thousands of immigrants, international students, and young professionals who fall in love with our city and east coast lifestyle. With housing prices a fraction of Boston, Seattle, Toronto, or Vancouver, low crime rates and our enviable combination of urban and rural communities and amenities, what's not to love?

fDi American Cities of the Future 2017/18 ranked Halifax Top 10 for Best Human Capital and Lifestyle

"There is no question that Nova Scotia will be key to our first Canadian Global Delivery Center's long-term success. The talent and technology, innovative partnering, and competitive market profile make a winning combination."

- John Lutz, Former President of IBM Canada

Halifax economic snapshot 2016

POPULATION

426,000 – Grew at 2.0%
(600,000 within a 1 hour drive; 750,000 within 2 hours)

GDP \$18,507 million – Grew at 2.0%

UNEMPLOYMENT RATE 6.1%

PARTICIPATION RATE 68.0%

FULL-TIME EMPLOYMENT 77.2%


INFLATION RATE

+1.7% Annual (10-year average)

EARNINGS GROWTH

+2.1% Annual (10-year average)





This is just our short list. This proposal takes you through why Amazon HQ2 belongs in Halifax, and speaks to the key decision drivers you've identified. The details that follow won't tell you a different story than what you've read here. But they will show that this isn't just talk.

We know Amazon has lots of options, but none are like Halifax. Before you make any decision, give us a call and let us introduce you to our city.

Come see for yourself why Halifax is the best location for Amazon HQ2.

Halifax's proposal on a page

Information requested for Amazon HQ2 Location

Decision drivers



Culture & Fit

Page 16

Requirement

- A compatible cultural and community environment for its long-term success
- A stable and consistent business climate



Site & Logistics

Page 24

Paramount

- Expeditious timetable for the location decision

Critical

- Utility infrastructure and zoning
- Personnel travel

Key Factors

- Travel time to a major highway(s)
- Travel time to an international airport



Cost Advantages & Incentives

Page 42

High Priority

- Stable and business-friendly environment and tax structure

Significant factors

- Incentives



Labor

Page 54

Critical

- A highly educated labor pool and a strong university system is required



Quality of Life

Page 78

- A compatible cultural and community environment

Halifax Works:

Using KPMG's cost competitiveness model, over 10 years
**AMAZON COULD POTENTIALLY SAVE MORE THAN
\$10 BILLION DOLLARS BY LOCATING HQ2 IN HALIFAX**
(compared to Seattle). See p. 50 for more information.

Why Halifax is Amazon's best decision for its HQ2 location

- We welcome new ideas, new cultures, and new ways of doing things. We work together
- A government that supports big opportunities and does their part to remove barriers to success
- We are home to one of North America's most vibrant, emerging innovation districts
- Nova Scotia is Canada's leader in greenhouse gas reductions
- Dalhousie, Eastern Canada's leading research university, and our other post-secondary institutions are ready, and eager to partner with Amazon to discover, invent and innovate
- 92 acres of central, urban oceanfront, primed for development—a once in a lifetime, unparalleled opportunity that does not exist anywhere else in North America
- A comprehensive development district that permits flexibility to the zoning of the lands
- Direct access to Halifax Harbor—the ocean offers ample opportunity for district energy
- A world-class fiber optic network with gigabit connections available to both consumers and businesses
- Some of the world's best internet connections to both Europe and the eastern US, thanks to GTT Communications' network of subsea cable
- Halifax has an average commute time to work of 24 minutes
- Superb regional transportation links
- Adjacent to the provincial highway system that provides easy access to all the communities throughout Halifax
- 25 minutes (18 miles) from the Halifax Stanfield International Airport
- Amazon employees can walk, bike, drive, use transit, or take a short ferry ride to work
- Halifax is the best deal in North America for Amazon HQ2—over 10 years Amazon will save more than \$10 billion dollars in Halifax (compared to Seattle)
- Among 17 North American cities, Halifax has the lowest cost of labor for every position Amazon needs
- A payroll rebate of 5–10% (subject to provincial consent)
- To foster business growth in Halifax, there are considerable business development incentives at the federal, provincial and municipal levels aimed at supporting the establishment of operations, and attracting, building and retaining a loyal, talented, and technically proficient workforce. Halifax is committed to working with Amazon to establish your HQ2 and guide you through the business location process
- Canada's labor force moves to where jobs are located across the country
- Canada has 40,000+ graduates each year from Science, Technology, Engineering, Math, and Computer Science (STEM) academic programs
- More than 36,000 students are enrolled at Halifax's seven post-secondary institutions each year
- Canada's doors are open to immigrants, particularly to highly skilled and educated workers
- Nova Scotia offers additional immigration advantages through pathways not available elsewhere
- K-12 education in Halifax provides a variety of unique opportunities to create and collaborate on coding and robotics, and develop an entrepreneurial mindset
- A centuries-old city with a young and energetic culture that is driven by discovery, by connections to each other, and to the environment
- An irrepressible belief that we live in the best place in the world
- Housing prices half of what you'll find in Boston, Seattle, Toronto, or Vancouver
- A low crime rate
- An amazing array of educational opportunities for learners of every age
- Art, theater, music, restaurants, and more craft breweries per capita than any other city in Canada

Don't just take our word for it:

NTT DATA

Halifax has been a part of our global delivery model for over 18 years and has allowed us to provide world-class service to clients across North America. The deep IT talent pool allows us to work closely with our clients to strategically scale to meet their dynamic business and information technology needs.

- **GREG FORAN,**
VICE PRESIDENT,
GLOBAL DELIVERY,
NTT DATA

 **MUFG**

Halifax has many advantages over other locations in the investor services industry including access to innovative and flexible universities and new graduates; a time zone advantage over the United States; geographical proximity and easy travel to financial centers like New York, Chicago, and London; and an exceptional quality of life that enables MUFG to attract and recruit employees from around the world.

- **KEVIN MURPHY,**
HEAD OF OPERATIONS,
HALIFAX, MITSUBISHI UFG,
FINANCIAL SERVICES



This region has some incredible strengths, including a time difference that allows us to start our work day before most of Canada, excellent post-secondary institutions, access to a highly skilled workforce and a superb quality of life. One of Halifax's main differentiators is the business community—it's an ecosystem of experienced and emerging business leaders who are welcoming, engaged and supportive of each other. I can tell you from firsthand experience that it's not like this everywhere else. It's something to be valued, nurtured and not taken for granted!

- **ROGER HOWARD,**
ROYAL BANK OF CANADA



With its skilled workforce, business friendly environment, competitive costs, and advantageous geographical location, Nova Scotia has been a cornerstone of our Canadian operations for many years and will continue to be an important part of our growth strategy.

- **RICHARD D. ACKERMAN,**
VICE PRESIDENT,
L3-ELECTRONIC SYSTEM
SERVICES



We see Halifax as a strategic center to develop our Canadian operations. With Nova Scotia's education infrastructure and competitive advantages, we know it is the right place for our office and training center.

- **WILLIAM KEUNEN,**
GLOBAL DIRECTOR,
CITCO FUND SERVICES



As an international energy company based in Halifax, Emera does business throughout Eastern Canada, the US Northeast and the Caribbean. Halifax is a great place for our head office and we're proud to invest in the future of this city and the region.

- **CHRIS HUSKILSON,**
PRESIDENT AND
CEO, EMERA INC.



Young people can choose literally anywhere in the world to work and they understand what's available to them. Quality of place is so important, and Halifax has it. It's an amazing city. It has the urban benefits of a big city, with the feeling that you're not in a city at all. It's a pretty compelling value proposition.

- **SCOTT BELTON,**
SENIOR VICE
PRESIDENT,
TD CANADA TRUST
- ATLANTIC



A photograph of the Seattle skyline at night, viewed from across a body of water. The city lights are visible against a dark sky with some clouds. The foreground shows a concrete wall and some greenery.

1.

A PERFECT FIT

**Amazon transformed Seattle.
It's more than just having an
impact or changing a place.
Amazon is a creator. You
imagine and work tirelessly
to make your vision a reality.**

COMMUNITY & CULTURE

Like Amazon, we stand for openness, inclusiveness, and generosity. We welcome new ideas, new cultures, and new ways of doing things. We work together. You're a city-maker. We're the city that's made for making.

CANADA IS OPEN FOR BUSINESS

Our values have created a strong and stable business, investment, and trade climate. We benefit from a sound, efficient financial system supported by competitive taxes and business costs, and a government that invests in the innovative, clean, inclusive economy of tomorrow.

Here's what you can count on from Canada:

- Not only are we the most democratic country in the G20 (EIU), Canada is also the easiest place to start a business in the G7 and OECD (World Bank)
- Canadian employers pay on average 25% of payroll in health care costs and benefits, compared to 37% in the US—meaning savings of up to \$600 million a year for 50,000 employees paid \$100,000 each (KPMG Competitive Alternatives 2016)
- We boast R&D-intensive sectors with the lowest costs in the G7 (KPMG) – 27.7% advantage over the US
- We have thousands of vibrant, healthy, and connected cities and communities, and are first among 60 countries for quality of life (US News)

Canada offers a 22% to 30% cost advantage over the US in Amazon's key sectors.

(KPMG Competitive Alternatives 2016)

STRONG BUSINESS IN A STRONG CITY

Halifax has the ideal business environment for Amazon.

From Halifax, Amazon can easily and securely move goods and data in and out of North America, travel to and from international destinations, and do business and deliver services across the Americas and Europe on the same work day. Here, you can accelerate and succeed like never before thanks to highly competitive business costs, a skilled and educated workforce, and diverse industry sectors.

Like you, we believe transformation comes from collaboration and invention. Halifax has citizens who care about their city. Deeply.



Here, everyone has a role to play in creating a vibrant, welcoming, prosperous city. A city perfect for great business, and for greater lives. Amazon can join an engaged and co-operative city where public and private work together, all towards a shared vision.

Big thinking

In Halifax, Amazon will be a part of one of North America's most vibrant, emerging innovation districts. Start-ups, established companies, business incubators, accelerators, anchor post-secondary institutions and research facilities are clustered in the heart of our city. We're building a city where education, industry, and residents are intertwined. Global companies are expanding their footprints in Halifax thanks to the quality of talent in our city and their strong relationships with Halifax's universities and colleges.

Our universities and colleges are leaders in R&D, with cutting edge research in data analytics, engineering, life sciences, and ocean technology.

For Amazon, Halifax's innovation ecosystem is an abundant source of new ideas, talent, and fresh perspectives. In addition to potential venture-capital opportunities, it creates a feed-in technology market for Amazon to adopt or commercialize. Our universities and colleges are ready and eager to partner with Amazon to discover, invent, and innovate.

"There is a rising tide of innovation in Eastern Canada driven by our strengths and partnerships with the world's best."

– **Richard Florizone, President,**
Dalhousie University



Diversity and inclusion

Embracing difference is a part of everything we do, think, and pursue in Halifax.

To us, diversity is about more than race, ability, sexual orientation, language, gender, or any other descriptive category. Our city celebrates, values, and understands unique views, ideas, life experiences, skills, and knowledge. Our city strives to eliminate barriers, so every person can participate and contribute in a meaningful way.

We have community initiatives focused on African Canadians, Acadians/Francophones, Urban Indigenous, LGBTQ+, newcomers, and persons with disabilities. Halifax is also working with our Aboriginal community to develop a strategy based on the principles of truth and reconciliation to create a new relationship with Canada's First Nations.

Our city attracts thousands of immigrants every year, and 70% of newcomers put down roots in our city. Over 1,000 Syrian refugees were welcomed into our city last year and while some come with money and professional backgrounds, others arrive with little more than the will and determination to build a better life for themselves, their families, and their communities.

Sustainability

We share Amazon's commitment to renewable energy and a clean economy, and we know a clean power plan is born from collaboration and partnership. We work to build more efficient and effective transportation systems, and find and experiment with new ideas and solutions, all designed to create a place where people want to live and work.

Our energy sector is growing and filled with opportunities in both renewable resources and sustainable technologies, and we have all the services, expertise, and infrastructure that Amazon

needs. Nova Scotia is Canada's leader in greenhouse gas reductions, having already achieved our 2030 goal, and we are on track to exceed our goal by 40%. Our renewable electricity supply is above 25% and on track to reach 40% by 2020, and we have access to one of the biggest renewable energy prospects worldwide in tidal power, with an estimated potential of up to 60,000 MW of energy per day.

That's just the beginning. We'll contribute to Amazon's evolving energy portfolio, advance your commitment to renewable energy, and continue to increase energy efficiency.



HALIFAX STORIES:

Musemo Handahu

OCCUPATION:

Blogger, Writer, & Stylist

: [misslionhunter](#)

I came to Canada from Zimbabwe to attend Acadia University. After graduating, I moved to Halifax, fell in love with the city, and stayed!

BEST THING ABOUT LIVING HERE:

The best thing about living in Halifax is the peaceful temperament the city has always given me. I love being part of a place that has welcomed me with open arms, a place where I've built a strong network of friends, and a place where I've discovered myself and my passions.







2.

ONCE-IN-A-LIFETIME LOCATION

Amazon's Halifax HQ2 site is like no other in North America. Situated on 92 acres on the shores of Halifax Harbor, it is a transformative opportunity to create something iconic.

SITE OPTIONS

Perched on the shore of Halifax Harbor sits the ideal primary location for Amazon HQ2. The site, Shannon Park, is a once-in-a-lifetime opportunity that does not exist anywhere else in North America.

It is a former military residential development, built in the 1950s and closed some 50 years later. Now, its 92 acres have been cleared, creating a development-prepped site in the very heart of our city.

With affordable, established residential neighborhoods close by, Amazon employees can choose to walk, bike, bus, drive, or take a short ferry ride to work. It is an unparalleled waterfront location for HQ2.



HALIFAX LOGISTICS PARK,
BURNSIDE

AMAZON HQ2 CAMPUS,
SHANNON PARK

PORT OF HALIFAX, CERES
CONTAINER TERMINAL
5.5 MILES

COGSWELL
INTERCHANGE LANDS

CITY CENTER
4 MILES

PORT OF HALIFAX,
HALTERM CONTAINER
TERMINAL 9.5 MILES

Halifax Harbor





Direct access to the
Halifax Harbor for
district energy.

Regional wastewater main
line with ample capacity
for development on the edge
of the site.



Potential for ferry
service direct to the
Amazon Campus.



Recreational trails and
mass transit options
throughout the site and city.

The Future Home of Amazon Halifax HQ2 Campus

Located within the urban core, on the shore of the Halifax Harbor, with easy access to road networks and highways, Shannon Park is the ideal site for Amazon's HQ2 campus.

An aerial photograph of a coastal city, likely Halifax, Nova Scotia. The image shows a mix of urban development, green spaces, and a large body of water. A prominent yellow callout box is overlaid on the left side of the image, containing text about a development opportunity. In the background, a large suspension bridge is visible across the water. The foreground shows a mix of green fields, some cleared land, and a road.

**92 acres of central,
urban oceanfront,
primed for development.**

**Nine development parcels large
enough for Amazon's HQ2 Campus.**

Located next to the
provincial highway system,
making it easy to navigate
the city and province.



Easy connections to rail,
road, and mass transit service.



Only 25 minutes
from Halifax Stanfield
International Airport.

GENERAL SITE INFORMATION AND OWNERSHIP

The Shannon Park redevelopment site totals 92 acres of land. Approximately 82 acres are owned by Canada Lands Company—a federally-owned corporation that assists the Government of Canada in the disposal of surplus lands—and are currently being prepared for development. The remaining 10 acres are owned by the Millbrook First Nation, who have been participating in the Canada Lands Company master planning process and are also preparing for the development of their land. The intention for the Shannon Park land is for Canada Lands Company to act as the Master Developer and sell land in accordance with the approved master plan for the site.

The nearby residential community and Canada Lands Company agree that a plan that makes use of this site as an extension of Halifax's urban center creates the best future for Shannon Park. They support the creation of a walkable mix of historical and state-of-the-art development including parks, trails, and pedestrian connections that link business, industrial, government, and cultural tenants. They support a plan that encompasses a range of land uses, including access and connections to the waterfront around which Halifax is built.

ZONING AND PERMITTING PROCESS

The Shannon Park land carries the Comprehensive Development District (CDD) zone, which allows for the development agreement process that is

currently underway, as well as the industrial zone I-3. The CDD mechanism permits flexibility in the zoning of the land.

The Canada Lands Company has already begun the approvals process for a development agreement on the site. With the approval of the development agreement, anticipated in 2018, site work can commence to connect to transportation and sewage infrastructure in the area. When Canada Lands Company sells parcels within the block structure of the master plan, the planning approvals in the development agreement will carry with the property, but builders will be subject to building code review and inspection.

READINESS

This redevelopment opportunity on a prominent brownfield site is well-timed for the Amazon Halifax HQ2 project. Canada Lands Company is planning for construction of Phase 1 of the redevelopment in 2019. Phase 1 of the Shannon Park project contains the central park, the central collector road, and nine development parcels. These parcels are large enough to capture the necessary square footage of the HQ2 project outlined in the RFP requirements. Phase 1 will be developed in a compact and mixed form that will be in line with the community vision for Shannon Park and the types of community described in Amazon's RFP.

The regional wastewater system main line runs along the edge of the site, providing ample capacity for development with no local pipe restrictions.

DISTRICT ENERGY

Located on the Halifax Harbor, direct access to the ocean offers a great opportunity for district energy. Buildings located around the harbor currently take advantage of this for building heating and cooling, and the local design community has the expertise needed to incorporate this into all Amazon Halifax HQ2 buildings.

MOBILITY, ACTIVE TRANSPORTATION AND TRANSIT

The Shannon Park site has superb regional transportation links, benefiting from being in the urban center of Halifax, where historically well-connected communities support residents using predominantly alternative modes of transportation for trips to work. It is located adjacent to the provincial highway system, 25 minutes (18 miles) from the Halifax Stanfield International Airport, and sits on the north end Dartmouth waterfront of Halifax Harbor.

The site is adjacent to the Canadian National Railroad main line and is serviced by public transit links, including the MetroLink rapid transit service. In addition to the current ferries that connect the communities of Dartmouth and Woodside with the Halifax waterfront, the redevelopment of Shannon Park provides an opportunity for direct ferry connection to additional communities around the Halifax Harbor. These options have been investigated through the process, and the addition of a significant volume of Amazon employees would be included in the new analysis to prove a case for another ferry route.

Pedestrian amenities and connections to recreational trail systems and a variety of mass transit options further distinguish Shannon Park as a unique and optimal site for Amazon Halifax HQ2. Designs for a prominent waterfront trail were revealed earlier this year and connections to neighboring communities will be made through the redevelopment project.

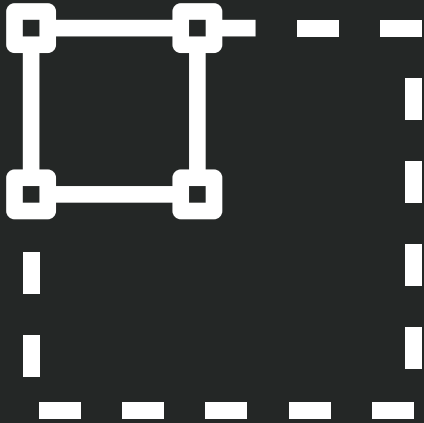
MOBILITY, AUTOMOBILE

With respect to automobile travel, the site is adjacent to the provincial 111 highway and provides easy access to all the communities throughout Halifax. Specific travel times are listed below, with references to prominent residential neighborhoods in addition to the ideal travel times from the site listed in the RFP.

Commute Time

Travel time from Amazon Halifax HQ2 Campus

To	Distance	Travel/Commute Time
Population Center	0 miles	N/A, located within major population center
Downtown Halifax and Cogswell Interchange Lands	4 miles	10 minutes
Halifax Stanfield International Airport	18 miles	25 minutes
Halifax Logistics Park	4 miles	8 minutes
Hydrostone	3 miles	7 minutes
Crichton Park	3 miles	10 minutes
West End Halifax	5 miles	15 minutes
Bedford West	10 miles	20 minutes
Fall River	16 miles	20 minutes
Lawrencetown	17 miles	30 minutes
Avonport	47 miles	50 minutes



Expansion made simple

The Shannon Park site will meet all of Amazon's HQ2 needs. But that's not the end of the story. Halifax has room for Amazon to grow. The Cogswell Interchange Lands and the Halifax Logistics Park are two excellent opportunities ready for Amazon when the time is right.



Cogswell Interchange Lands

Halifax is in the process of removing a 1960s highway interchange (Cogswell Interchange) that sits in our downtown.

The plan is to replace the Cogswell Interchange with a sixteen-acre master-planned redevelopment that includes a mix of residential and commercial development. More than six acres of pad ready land will be released to private developers. This provides an opportunity for Amazon to build a presence in the heart of the city's downtown core and work within Halifax's Innovation District. The Cogswell Interchange lands are located four miles from the proposed Amazon Halifax HQ2 Campus.

The design stages of the Cogswell Interchange Lands are underway, with demolition of the highway infrastructure expected to begin in 2019.



Halifax Logistics Park, Burnside

Also located just four miles from Shannon Park, the Halifax Logistics Park is the newest phase of Halifax's Burnside Industrial Park. The Logistics Park offers prime industrial lands for uses or purposes less suitable for an urban environment but still providing optimal connectivity to Amazon Halifax HQ2.

The Burnside Industrial Park is the largest industrial park north of Boston and east of Montreal, with almost 2,000 enterprises and approximately 30,000 employees. It offers already prepped light and heavy industrial lands strategically located between the core of Halifax and Halifax Stanfield International Airport, with direct access to rail lines, shipping, warehousing, and the provincial highway system (the Trans Canada Highway).

The Logistics Park is designed as a modern park, with fully serviced lots and proximity to commercial and retail amenities to support the large workforce.

Technical infrastructure

CELLULAR COVERAGE

Halifax benefits from four main service providers: Bell, EastLink, Telus, and Rogers. These service providers deliver consumers and businesses competitive offers while providing industry-leading LTE and LTE advanced technology, with download speeds up to 600 Mbps.

FIBER OPTIC NETWORK

Halifax and all of Nova Scotia offer a world-class fiber optic network with gigabit connections available to both consumers (fiber to the home) and businesses (fiber to the business), a digital communications system, a self-generating power grid, and some of the world's best internet connections to both Europe and the Eastern US, thanks to GTT Communications' network of subsea cables.

Nova Scotia is a landing station for Hibernia Express, GTT Communications' transatlantic cable which

provides the lowest latency connections available between major commercial and financial centers in North America, Europe, and beyond. Hibernia Express is the industry's fastest transatlantic cable, offering customers unparalleled latency performance of less than 59 milliseconds between New York and London. The state-of-the-art cable system garnered two Global Carrier Awards in 2015—Subsea Project of the Year and Best Subsea Innovation—as well as the Global Telecom Business Innovation Award for 2016.

Halifax also benefits from Tier 1 Data Center and Cloud hosting providers offering world-class connectivity speeds and networks and scalable compute capability across diverse locations.

For consumers and enterprises, there are three major fiber optic connectivity providers in Halifax: Bell, Eastlink and Rogers.

"Bell was one of the first providers in North America to deploy superfast fiber-to-the-home broadband networks and in 2010, Halifax became one of the first cities to receive it. Bell was also the first in North America to introduce Tri-band LTE Advanced, the fastest mobile network technology available and again we chose Halifax to be one of our first cities to receive it. Today, our wireless and fiber broadband networks are delivering the superfast speeds that are keeping Halifax at the leading edge of technology and innovation in North America".

– George Cope, President and CEO – BCE Inc. & Bell Canada

Transportation and logistics infrastructure

THE HALIFAX GATEWAY

Built for speed and volume, the Halifax Gateway is a strategic location for the efficient movement of goods and people. It includes the Halifax Stanfield International Airport, the Port of Halifax, two Super Post-Panamax container terminals, CN Rail, a strong logistics and warehousing sector, and excellent Class 1 highway infrastructure.

Halifax Stanfield International Airport

- Largest airport in Eastern Canada
- US pre-clearance
- 40,000 square foot air cargo facility with airside access
- 24/7 operations with no curfew
- Two runways: 10,500 x 200 feet and 7,700 feet x 200 feet

CN Rail

- CN main line and CN intermodal facility with on-dock rail at both container terminals in the Port of Halifax
- CN owned Autoport in Halifax is their largest in North America, moving approximately 238,000 vehicles in 2016

Road Infrastructure

- Double-lane highway network linking Halifax to the rest of North America

Port of Halifax

- Only port on the Canadian East Coast capable of handling the Ultra Class Ships
- Two container terminals (with a total of seven Post-Panamax cranes; six grain towers)
- Imperial Oil wharves for tanker loading and discharging
- Halifax Seaport full-service cruise terminal and more than 2,000 feet of continuous berth space
- Richmond Terminal is ideally situated in the Port of Halifax and handles industrial cargo and offshore supply vessels
- The Port of Sheet Harbour, with its unrestricted 12 acres dockside laydown area, can accommodate large scale project cargo such as wind turbines

Halifax Logistics Park

- This logistics park is the largest industrial park north of Boston
- Next to five major highways and 10–15 minutes from the airport, the port, and downtown Halifax
- Four miles to Amazon Halifax HQ2 site
- 128 acres of available land that is pad ready with utility and infrastructure in place



SUPPLY CHAIN CONSIDERATIONS FOR THE PORT OF HALIFAX

Global shipping routes are being redrawn to accommodate the general shift towards larger vessels and is now in full acceleration thanks to four factors: the expanded Panama Canal; the raising of the Bayonne Bridge in New York; the additional lane of the Suez Canal which opened in 2015; and the formation of three strategic ocean carrier shipping alliances, two of which are calling at the Port of Halifax—Ocean Alliance, and THE Alliance.

The Port of Halifax is among the small number of container ports along the East Coast of North America that can berth and service vessels over 10,000 TEU; the first vessel of this size called on Halifax earlier this year.

This type of large scale upheaval is creating opportunities for the Port of Halifax as a full-service, deep-water, big ship port, and will create prosperity for forward-thinking companies that can use these attributes to their benefit.



Canada Lands Company
Société immobilière du Canada

September 29, 2017

Amazon
Office of Economic Development
c/o Site Manager Golden
2121 7th Ave
Seattle, WA 98121

To Whom it May Concern:

We are writing to confirm the support of Canada Lands Company to include its Shannon Park land in the Halifax Partnership's submission to Amazon to become the site of a second corporate headquarters (HQ2).

The acreage at Shannon Park offers unparalleled advantages. Located within the urban core, on the shore of the Halifax Harbour, with easy access to road networks and highways, the 82- acre site is readily accessible by land or water and within a short drive of Halifax Stanfield International Airport. The site offers high visibility on a world-class harbour that welcomes container ships from 150 countries.

Efforts to redevelop the Shannon Park site are well advanced, with plans for a mixed-use development currently under consideration by Halifax Regional Municipality. As a result, Canada Lands Company has a firm understanding of the site's attributes and the site is well positioned for development within Amazon's stated timelines.

Should Amazon choose the unique opportunity that Halifax and our site offers, the Shannon Park land could readily transition to accommodate this unprecedented opportunity for regional economic development.

Yours truly,

John McBain President and CEO

1 University Avenue, Suite 1200
Toronto, Ontario
M5J 2P1
T 416-952-6100
www.clc.ca

Canada



Kevin Howlett

Senior Vice President, Regional Markets and
Government Relations
Premier vice-président – Marchés régionaux
et Relations gouvernementales

October 6, 2017

Ms. Nancy Phillips
VP Investment, Trade and International Partnerships
Halifax Partnership

Dear Ms. Phillips,

I am writing to you regarding your city's candidacy to attract Amazon's second corporate headquarters (HQ2). We have been made aware that different Canadian cities intend to apply and that as part of the Request for Proposal (RFP) process, Amazon has signaled that daily direct flights to Seattle, New York, San Francisco/Bay Area, and Washington, D.C. will be an important consideration in its final decision.

As such, I wanted to provide you with Air Canada's position that could support your city's bid for Amazon HQ2. Air Canada is particularly proud of its critical role in connecting the whole of Canada, but particularly its major metropolitan areas to markets in the United States and the world. This is strongly evidenced by these facts:

- 1- Air Canada is Canada's largest airline and the largest provider of scheduled passenger services in the Canadian market, the Canada-U.S. transborder market and in the international market to and from Canada. We fly to 64 airports in Canada, 57 in the United States and 91 in Europe, Africa, the Middle East, Asia, Australia, the Caribbean, Mexico, Central America and South America.
- 2- We do so by flying to more than 200 destinations on six continents from Canada. A customer of Air Canada from the major metropolitan centres can fly directly, or in many instances through only one connection to most of our destinations. Air Canada, Air Canada Rouge and its Air Canada Express regional partners operate on average 1,580 scheduled flights each day.

Air Canada knows air connectivity is a prime consideration for any company choosing a headquarters location. As Canada's largest carrier and the airline with the most transborder services between Canada and the U.S., we are uniquely positioned to connect Seattle or any other U.S. city with any successful Canadian city on a commercially viable basis. As such, steps would be taken to further facilitate travel to/from any successful Canadian city.

Sincerely,

Kevin Howlett

Senior Vice President, Regional Markets and Government Relations
Premier vice-président – Marchés régionaux et Relations gouvernementales

6001 Grant McConachie Way
YVR 3151
Vancouver, BC V7B 1K3

October 2, 2017

Amazon
Office of Economic Development
c/o Site Manager Golden
2121 7th Ave
Seattle, WA 98121

Dear Amazon,

Halifax International Airport Authority (HIAA) is pleased to provide this letter of support in Halifax's bid to house Amazon's next headquarters (HQ2). Halifax Stanfield (YHZ) is Atlantic Canada's principal full-service air gateway providing passengers and cargo clients with access to markets around the globe. An internationally recognized leader in customer service, Halifax Stanfield is certified as Airport Service Quality Assured – an industry gold standard for service excellence.

In response to Amazon's preference of having direct daily flights to Seattle, New York, San Francisco Bay Area and Washington, DC, Halifax Stanfield will be a key partner in leading discussions with all existing and future airline partners to advance direct connections to support Halifax in its bid for Amazon's HQ2.

Currently, Halifax Stanfield has three daily flights to Newark, New Jersey with United Airlines as well service to New York City (LGA) with Delta Air Lines. Both of these hubs serve the broader U.S. market efficiently and effectively. Our transborder services are also complemented by the three-time's daily service to Boston offered by Air Canada and WestJet. Should Halifax make the shortlist as a possible site for Amazon's HQ2, we would be pleased to look at opportunities to expand non-stop service from Halifax into the US as well as work with potential air partners on direct service access to Washington, Seattle and the San Francisco Bay Area. Halifax Stanfield is also very connected to Seattle and San Francisco, with one-stop flights through Toronto and Montréal.

Halifax Stanfield is the only airport east of Montreal with a U.S. customs pre-clearance, allowing passengers traveling direct to the United States to go through U.S. Customs and Border Protection prior to departing Halifax. We are also not capacity constrained unlike other Tier 1 airports. Taken together, YHZ is well poised for future growth opportunities and an improved passenger experience. Our value proposition to Amazon is to provide faster connections and the ability to get where you are going in the United States quicker.

Halifax Stanfield is pleased to support Halifax as a community partner on the Amazon HQ2 bid.

Sincerely,




Joyce Carter, FCPA, FCA, ICD.D
President and CEO



connecting means the world

HALIFAX STORIES:

Kourosh Rad

 RadUrbanist

OCCUPATION:

Urban Planner, Vice President R&D,
Compass Commercial

After visiting several other cities in Canada, my parents fell in love with Halifax and decided to immigrate here from Iran in 2007.

BEST THING ABOUT LIVING HERE:

Proximity to everything! I can go surfing before work, work a few hours, meet a friend for lunch, go for dinner and a drink after work at a hip bar, take my bicycle out for a spin by the ocean and still make it home for a movie with my girlfriend before sleep. Sounds like a lot, but I've done all that in one day many times in the past.



A nighttime photograph of a city street. On the left is a multi-story brick building with many windows. On the right is a modern building with a glass facade and a vertical sign that says "seaport". The street is paved with cobblestones and has some greenery. The sky is dark.

3.

A \$10 BILLION ADVANTAGE

Halifax is the best deal in North America for Amazon's HQ2. Halifax offers significant cost advantages over other global cities, ranking 6th out of 108 mature markets for overall business competitiveness.



COST AND INCENTIVES

Over 10 years, Amazon will save more than \$10 billion dollars by locating HQ2 in Halifax.

AMAZON'S COST SAVINGS IN HALIFAX

Our analysis is based on KPMG's Cost Competitiveness Model comparing Halifax to Seattle. It assumes that the Amazon HQ2 labor force will comprise 40% core IT functions and 60% non-core IT functions. As proxies for these two categories, we use KPMG's "software design" and "corporate support" services categories, respectively, averaging cost lines for the two categories using the 40/60 weights.

For the purposes of illustration, we use a simplified ten-year timeline assuming that:

- 100 acres of land is acquired in year one
- 500,000 square feet of facilities are constructed in year one, with equal annual construction increments occurring thereafter until a total of 8,000,000 square feet is reached in year ten
- The labor force ramps up linearly from 5,000 employees in year one to 50,000 in year ten
- Seattle employees earn average annual compensation of \$100,000

Differentials in KPMG's labor, land, and building construction line items between Halifax and Seattle

are used to calculate savings per employee, per square foot, and per acre in the relevant years attributable to locating in Halifax.

Non-labor location specific costs (utilities, taxes, etc.) are not captured here due to lack of the necessary data. The KPMG data show that labor tends to account for approximately 80–90% of all location specific costs (see table on pages 50–51).

Annual Operating Cost of Amazon HQ2



Using fDi Benchmark, an operating cost model was simulated for Amazon's HQ2 in various North American cities. This model was primarily based on an 8 million square foot campus with 50,000 employees, broken down into occupations based on the estimates found in the talent section of this chapter.

HALIFAX RANKS 6TH FOR OPERATIONAL AND 6TH FOR LABOR COSTS

(KPMG Competitive Alternatives, 2016).

- Office space for \$17.81 per square foot in new build commercial space throughout the urban core.
- Median home prices in Halifax are well below both Canadian and American averages. The average sale price of a single-family home in Halifax is \$240,243.
- Larger industrial infrastructure close to downtown in the largest business park east of Montréal at \$6.00 per square foot.

Incentives

Amazon's Halifax HQ2 is a transformative opportunity for Halifax. To foster this kind of business growth there are considerable business development incentives available at the federal, provincial, and municipal levels aimed at supporting the establishment of operations, and attracting, building, and retaining a loyal, talented, and technically proficient workforce.

Nova Scotia Business Inc. (NSBI) is the Province of Nova Scotia's business development agency and is committed to guiding Amazon through the business location process. NSBI and the Halifax Partnership will work closely with Amazon to identify relevant incentives and programs, and will connect Amazon with the resources and decision makers to help you access all available supports.

NSBI is the provincial administrator of Nova Scotia's Payroll Rebate tool—a performance-based incentive that provides a return to companies like Amazon on eligible payroll expenses. The Payroll Rebate tool has supported numerous multinational corporations—IBM and NTT Data among them—to build world-class, globally competitive business centers in Nova Scotia. Nova Scotia's Payroll Rebate tool has also supported the world's 10th largest bank—Japan's Mitsubishi Financial (MUFG)—in establishing its first North American beachhead. In 2016–2017, over \$35 million (CAD) in funding was committed through the Payroll Rebate tool, including incentives for companies hiring recent graduates and employees new to Nova Scotia.

The parameters of the Payroll Rebate evolve through a dialogue between NSBI and potential clients to drill down into the business' workforce expansion plans. In line with Amazon's projected growth, NSBI and Amazon would devise and negotiate the terms of a Payroll Rebate incentive to support the company's workforce expansion in Nova Scotia. NSBI would welcome the opportunity for such a dialogue with Amazon, and would be prepared to present a specific Payroll Rebate incentive for Amazon at the conclusion of this process.

The Nova Scotia Department of Labor and Advanced Education offers numerous programs that would assist Amazon in building a best-in-class workforce, including the Workforce Innovation and Productivity Skills Incentive (WIPSI) and the Co-operative Education Incentive. WIPSI supports incremental training in order to improve productivity, increase innovation, and promote the introduction of new technology, covering up to 50% of direct costs associated with training staff. Additionally, the Co-operative Education Incentive provides employers with a subsidy of \$7.50 (CAD) an hour—which is half the minimum wage an employer must pay under the program, per student, for career-related work experiences for university and community college co-operative students.

Nova Scotia's commitment from all levels of government to increasing innovation is reinforced by programs, grants, and incentives aimed specifically at transforming how businesses can succeed here. The Province of Nova Scotia recently announced a new Innovation Rebate Program, which will support businesses through their investment

in capital projects that drive business innovation.

Companies in Nova Scotia also have access to one of the most competitive research and development tax credits in Canada through the federal government's Scientific Research and Experimental Development (SR&ED) Tax Incentive Program.

This proposal has the full support of the Canadian federal government, who are standing by to discuss the process of accessing larger federal incentives. Should Amazon choose to take a closer look at Halifax, NSBI will be your partner in meeting with the federal government to secure a suite of incentives aimed at assisting Amazon's growth in Canada.

Halifax has the ability to tailor property tax solutions to promote economic development. Provincial legislation provides for site-specific agreements in some cases, and other tools such as phase-in of taxes in brownfield areas and the ability to set rates to promote development aligned to planning areas. Combined with Provincial and Federal incentives, Halifax is open to exploring an attractive property tax treatment best suited to economic conditions and benefits. Halifax has executed special long-term tax agreements for such situations in the past.

UNCERTAIN INCENTIVES

Many of the larger incentives which Amazon would be able to avail themselves of may influence the disbursements and/or negotiations of others. Once negotiated, Amazon can be confident in the disbursement of funds under the discretionary incentives described above. These incentives are managed through legal contracts and are not susceptible to changes in political environment. Tax-based incentives are based on Amazon's eligible costs and would need to be designed in close consultation with Amazon. These tax based incentives would be estimated through early conversations with Amazon, and once formalized, would possess a high degree of certainty.

The Incentives Overview table on the following pages outlines the various incentives available in Nova Scotia. The Appendix provides detailed information on each program for Amazon's reference. We welcome the opportunity to continue the dialogue with Amazon to present how Nova Scotia is an ideal footprint for the company's continued growth and global expansion with HQ2.

Incentives Overview

Program details are available in the Appendix. All figures in this table are in Canadian dollars.

Program	Description	Provided By	Timing	Amount	Approval Timelines	Approval Authority	Total Value
WORKFORCE							
Payroll Rebate	Performance-based, financial incentive offered to qualified companies expanding or locating in Nova Scotia, offering a return on eligible gross payroll.	Province of Nova Scotia	Throughout the year	Terms to be negotiated			
Workplace Innovation and Productivity Skills Incentive (WIPSI)	Provides funding to companies to encourage investment in skills development and certification.	Province of Nova Scotia	Throughout the year	50% of direct training costs up to \$1 million annually.	Variable	Does not require legislated approval.	50% of direct training costs
The Co-op Education Incentive (CO-OP)	Provides wage assistance to organizations offering career-related work experiences for university and community college co-operative students.	Province of Nova Scotia	Three application periods: September, January, and May.	\$7.50/hour (50% of required minimum wage for co-op)	Variable	Does not require legislated approval.	To be negotiated
	Employers participating in IRAP and SR&ED are eligible for an "R&D Incentive" and may receive up to \$10.00 per hour.	Government of Canada	Three application periods: September, January, and May.	\$10.00/hour	Variable	Does not require legislated approval.	To be negotiated
TAX CREDITS							
Scientific Research and Experimental Development (SR&ED) Tax Incentive Program	The SR&ED tax incentive program provides tax incentives for the direct in-house costs of performing eligible R&D work in Canada.	Government of Canada	Annual	15% of eligible R&D costs for foreign-controlled businesses. 35% of eligible R&D costs for Canadian-controlled businesses.	Variable	Does not require legislated approval.	Based on eligible project costs.
Nova Scotia Research & Development Tax Credit	This incentive is a refundable corporate income tax credit, providing an additional 15% tax credit to Nova Scotia corporations that incur qualified SR&ED expenditures made in Nova Scotia, as defined by the federal Income Tax Act.	Province of Nova Scotia	Annual	15% of eligible R&D costs	Variable	Does not require legislated approval.	Based on eligible project costs.

Program	Description	Provided By	Timing	Amount	Approval Time-lines	Approval Authority	Total Value
Nova Scotia Capital Investment Tax Credit (CITC)	The CITC is a refundable corporate income tax credit claimed by eligible corporations for 15% of capital equipment acquired for use in Nova Scotia.	Province of Nova Scotia	Annual	Up to \$30 million	Variable	Does not require legislated approval.	Based on eligible project costs.
Digital Media Tax Credit (DMTC)	The DMTC is a refundable tax credit for costs directly related to the development of interactive digital media products in Nova Scotia.	Province of Nova Scotia	Annual	Up to 50% for labor costs directly related to the development of interactive digital media products.	Variable	Does not require legislated approval.	Based on eligible project costs.
Digital Animation Tax Credit (DATC)	The DATC is a refundable tax credit for costs directly related to the development of digital animation in Nova Scotia.	Province of Nova Scotia	Annual	Modeled on top of the DMTC with an additional 17.5% for animation labor expenditures.	Variable	Must be approved by the Minister of the Department of Finance and Treasury Board.	Based on eligible project costs.
SUPPORTS TO INNOVATION							
Strategic Innovation Fund	The Strategic Innovation Fund allocates repayable and non-repayable contributions to firms across all of Canada's industrial and technology sectors.	Government of Canada	Ongoing	To be negotiated			
Atlantic Innovation Fund (AIF)	The AIF helps companies develop and bring to market new products and services that lead to market success, help grow strategic sectors, or lead to the creation of research and commercialization partnerships.	Government of Canada	Ongoing	To be negotiated			
Innovation Rebate program (under development)	The Innovation Rebate Program provides a rebate of up to 15% to help businesses invest in capital projects that support the development of products and value-added products.	Province of Nova Scotia	Ongoing	Terms to be negotiated			
Nova Scotia Film & Television Production Incentive Fund	To be eligible for the Fund, you must have a permanent establishment in the province and be engaged primarily in the creation of film/video productions for public viewing. The Fund is available for projects with a Nova Scotia spend of at least \$25,000 (before Harmonized Sales Tax).	Province of Nova Scotia	Ongoing	Various percentages. Please see Appendix.	Variable	Does not require legislated approval.	Based on eligible project costs.
Canadian Media Fund	Through many programs, there is support for a dynamic environment where creators, producers, broadcasters, and distributors partner to generate content.	Government of Canada	Ongoing	Various amounts. Please see Appendix.	Variable	Varies	Based on eligible project costs.

Summary of Amazon's cost advantages and potential incentives

Amazon's cost savings in Halifax

Year	1	2	3	4
Employees	5,000	10,000	15,000	20,000
Average compensation, Seattle	\$100,000	\$100,000	\$100,000	\$100,000
Halifax labor costs as % of Seattle	63.8%	63.8%	63.8%	63.8%
Average compensation, Halifax	\$63,837	\$63,837	\$63,837	\$63,837
Halifax labor cost savings per employee	\$36,163	\$36,163	\$36,163	\$36,163
Halifax total labor cost savings	\$180,816,753	\$361,633,507	\$542,450,260	\$723,267,013
Land purchase, acres	100	–	–	–
Average land cost per acre, Seattle	\$367,000	\$367,000	\$367,000	\$367,000
Average land cost per acre, Halifax	\$198,000	\$198,000	\$198,000	\$198,000
Halifax land cost savings, per acre	\$169,000	\$169,000	\$169,000	\$169,000
Halifax total land cost savings	\$16,900,000	\$ –	\$ –	\$ –
Construction, square feet	500,000	833,333	833,333	833,333
Cumulative construction, square feet	500,000	1,333,333	2,166,667	3,000,000
Construction cost, \$/sq ft, Seattle	\$106.89	\$106.89	\$106.89	\$106.89
Construction cost, \$/sq ft, Halifax	\$92.95	\$92.95	\$92.95	\$92.95
Halifax construction cost savings \$/sq ft	\$13.94	\$13.94	\$13.94	\$13.94
Halifax total construction cost savings	\$6,970,000	\$11,616,667	\$11,616,667	\$11,616,667
Aggregate annual savings	\$204,686,753	\$373,250,173	\$554,066,927	\$734,883,680
Cumulative savings, not discounted	\$204,686,753	\$577,936,927	\$1,132,003,853	\$1,866,887,533

POTENTIAL INCENTIVES

As noted on the previous page, there are several incentives from the federal, provincial and municipal governments aimed at supporting the establishment of operations in Nova Scotia. Key to Amazon's incentive package will be the Nova Scotia Payroll Rebate Incentive. Below are examples of recent payroll incentive deals. We are standing by and ready to work closely with you to negotiate a suite of incentives for Amazon's HQ2 in Halifax.

March 2017 – IBM Canada

- Projected to create a total of 750 jobs over eight years
- IBM would spend a total of \$251 million in salaries and benefits
- Employees would pay direct taxes of approximately \$29,264,000
- IBM would be eligible to earn up to \$22,633,683
- For more information: <https://www.novascotiabusiness.com/news/investment-disclosures-16-17>

5	6	7	8	9	10
25,000	30,000	35,000	40,000	45,000	50,000
\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
63.8%	63.8%	63.8%	63.8%	63.8%	63.8%
\$63,837	\$63,837	\$63,837	\$63,837	\$63,837	\$63,837
\$36,163	\$36,163	\$36,163	\$36,163	\$36,163	\$36,163
\$904,083,767	\$1,084,900,520	\$1,265,717,273	\$1,446,534,026	\$1,627,350,780	\$1,808,167,533
–	–	–	–	–	–
\$367,000	\$367,000	\$367,000	\$367,000	\$367,000	\$367,000
\$198,000	\$198,000	\$198,000	\$198,000	\$198,000	\$198,000
\$169,000	\$169,000	\$169,000	\$169,000	\$169,000	\$169,000
\$ –	\$ –	\$ –	\$ –	\$ –	\$ –
833,333	833,333	833,333	833,333	833,333	833,333
3,833,333	4,666,667	5,500,000	6,333,333	7,166,667	8,000,000
\$106.89	\$106.89	\$106.89	\$106.89	\$106.89	\$106.89
\$92.95	\$92.95	\$92.95	\$92.95	\$92.95	\$92.95
\$13.94	\$13.94	\$13.94	\$13.94	\$13.94	\$13.94
\$11,616,667	\$11,616,667	\$11,616,667	\$11,616,667	\$11,616,667	\$11,616,667
\$915,700,433	\$1,096,517,187	\$1,277,333,940	\$1,458,150,693	\$1,638,967,446	\$1,819,784,200
\$2,782,587,966	\$3,879,105,153	\$5,156,439,093	\$6,614,589,786	\$8,253,557,232	\$10,073,341,432

March 2015 – RBC

- Projected to create a total of 500 new jobs within 10 years
- RBC would spend an estimated \$240 million in salaries and benefits
- Employees would pay provincial personal income taxes of approximately \$26 million
- RBC would be eligible to earn up to \$22 million
- For more information: <https://www.novascotiabusiness.com/news/nova-scotia-financial-services-sector-expands-rbc>





HALIFAX STORIES:

Christine Yang

📷: im_qin

OCCUPATION:

International Relations Officer,
Province of Nova Scotia

I came here to study at Mount Saint Vincent University and quickly fell in love with the city. After graduating, the community was so supportive and helped me find the opportunity that I needed to stay. I am now so grateful to call Halifax home.

BEST THING ABOUT LIVING HERE:

The balance of work and lifestyle is definitely number one. When you have one of those very busy days or weeks, it gives you peace of mind knowing you can be at places like the beach within 30 minutes.





4.

TOP TALENT THAT STAYS

People are the heart of any business. With one of the largest concentrations of universities and best-educated workforces in North America, Halifax has the kind of sustainable, skilled, and renewable talent to support knowledge-based industries.

LABOR FORCE

Access to skilled workers will be central to Amazon's success and labor will represent the largest cost line item in the HQ2 business plan. Halifax can provide the IT/high-tech talent that Amazon needs, and can do so at a lower cost than anywhere else.

It's why companies like IBM, Salesforce, Samsung, Ubisoft, and Tesla have established a presence in Halifax. And why we're ready for Amazon.

Halifax has a highly-educated population with approximately 70% of the workforce having post-secondary certification, 37% having a university certificate, diploma, or degree, and close to one-in-ten people having a graduate degree. The labor pool is fed by six local universities and three community college campuses that have total enrollments of over 36,000 students. Thousands of international students bring their unique connections and cultures to their schools, their workplaces, and their neighborhoods, making them valuable assets for companies that do business around the world.

Our talent pipeline is diverse, deep, and loyal, with a median tenure for employees in Halifax of more than nine years. In Canada, we also have the benefit of a mobile labor force.

Additionally, Halifax has seen tremendous recent growth in the numbers of arriving immigrants and international students. Halifax naturally draws in students and workers from the rest of the province of Nova Scotia and from the other three provinces in Eastern Canada.

A major new economic opportunity like Amazon HQ2 will act as a magnet for talented workers, similar to the way in which the energy boom attracted workers from all over Canada to Alberta and Saskatchewan during the years of high oil prices. Over 15 years (from 1999-2013), Calgary grew its population by 46.2% from 926,182 to 1,353,931. More than 124,000 Canadians and 140,000 immigrants moved to Calgary during this period, showing how excellent employment opportunities attract talent.

The HQ2 RFP organized Amazon's labor needs into the categories of executive/management, engineering (with a preference for software development engineers), legal, accounting, and administrative. For more detail on the breakdown of required roles, Amazon's current Seattle headquarters was analyzed via LinkedIn. This demonstrated that approximately 30% of the talent was in what can be classified as core-IT roles, and furthermore, that these roles are the fastest growing. After adjusting for the growth rate amongst these occupations a model was established to highlight the important engineering and product development positions. This model can be simplified to a 2:3 ratio of core IT/Tech occupations to non-IT occupations at HQ2, or roughly 20,000 from core-IT occupations, and 30,000 from non-IT occupations.

Based on the standard definition from the Information and Communications Technology Council (ICTC) of Canada, there were approximately 19,000 individuals working in core

IT occupations in Halifax in 2016. This proportion of core IT jobs located in Halifax places the city's Location Quotient for these occupations at 1.16, which indicates a 16% greater proportion of these roles than the national average.

Working Age (25-64) Educational Attainment		
Credential	Halifax	Canada
Graduate Degree	9.0%	6.7%
Bachelor's Degree	21.4%	16.5%
Other University	7.0%	7.6%
College/CEGEP	21.8%	21.3%
Apprenticeship	10.6%	12.1%
High School	20.5%	23.2%
No Degree	9.7%	12.7%

Source: Statistics Canada, National Household Survey, 2011

Jobs By Occupation

Category	Halifax	Nova Scotia	Eastern Canada	Canada
Core IT HQ2 Occupations	18,926	24,892	55,653	1,259,246
Non-IT HQ2 Occupations	42,102	67,888	158,742	3,119,821

Sources: Information and Communications Technology Council (ICTC), Emsi 2017

Top-notch post-secondary education

Nova Scotia has more engineering, applied science, mathematics and physical science graduates per capita than anywhere else in Canada.

The best talent comes to Halifax and wants to stay. Your employees won't just have a perfect place to build a life, but Halifax will give Amazon the educated, skilled, creative people you need to take the big leaps and do the exceptional.

"Our programming succeeds if it's connected to what the economy needs. We live and die on our partnerships with the private sector. Our contribution to the economy is providing the human capital."

– Don Bureaux, President and CEO of Nova Scotia Community College

DALHOUSIE UNIVERSITY IS THE LARGEST UNIVERSITY IN THE FOUR EASTERN PROVINCES.

- 18,800 students
- 13 faculties, including Computer Science, Engineering, and Management
- \$112M+ in funded research each year; 30 research centers
- 40+ PhD programs and 90+ Masters programs

Key highlights of Dalhousie University:

- Member of the U15 Group of top Canadian Research Universities.
- Home to several Canada Research Chairs (CRCs) exploring facets of Information Technology.
- Faculty of Computer Science has experienced year-on-year growth in student numbers across all programs (25% in 2017).
- Diverse range of undergraduate and graduate programs equips students to be the tech leaders of tomorrow.
- Bachelor of Applied Computer Science program combines technical education with business to ensure students have the problem solving, management, and communication skills to offer real value to industry.
- Home to the innovation and start-up sandbox, ShiftKey Labs, that encourages, develops, and promotes the entrepreneurial and innovative talents and ambitions of students, many of whom are industry and alumni partners.
- Home to the Institute for Big Data Analytics.

SAINT MARY'S UNIVERSITY IS THE PROVINCE'S SECOND LARGEST UNIVERSITY.

- 7,100 students
- Primarily undergraduate focus with Faculties of Arts, Science, and Commerce, but with several Masters and PhD level programs
- \$45 million in externally funded research over the past five years
- One-third of students are international—a proportion of international students not matched by any other university in the country

Key highlights of Saint Mary's:

- Saint Mary's Master of Technology Entrepreneurship & Innovation (MTEI) curriculum takes knowledge and skills from multiple disciplines and integrates them with best practices from industry to produce sharp, relevant learning.
- MTEI program is the first graduate degree program in Eastern Canada designed to drive innovation by raising the number of technology start-ups. The program receives approximately 140 applications per year and has been growing by about 32% per year since its inception. With 27 students currently in the program, the program expects to have 40 students in three to four years. When Amazon chooses Halifax for HQ2, the program could double the number of students and add another cohort.
- Saint Mary's new Master of Science in Computing & Data Analytics (MSc CDA) is designed to

meet the complex challenges associated with big data. It combines two essential aspects of computing and data analytics: software design, development, customization, and management, plus analytics and business intelligence—the acquisition, storage, management, and analysis of massive amounts of data to improve efficiency, innovation, and decision-making.

- The primary focus of the MSc CDA program is to develop highly qualified computing and data analytics professionals who will drive innovation and organizational success. MSc CDA prepares students for careers in the data science industry through experiential learning opportunities and industry interaction.
- Over the past few years, the MSc CDA program has grown from 18 students in its first year in 2015/2016 to 40 students in two cohorts this academic year. The program will grow with the demand for its graduates and aims for close to 100% employment. With Halifax as the home of HQ2, the program could expect to almost double current enrollment projections and reach 75 students.

Halifax is home to excellent post-secondary institutions that feed into the local labor force.

MOUNT SAINT VINCENT UNIVERSITY IS COMMITTED TO THE ADVANCEMENT OF WOMEN.

- 4,000 students
- Mount Saint Vincent University was one of the only institutions of higher education for women in Canada when founded in 1873.
- Mount Saint Vincent is home to the longest-standing and second-largest accredited co-operative education program in Eastern Canada; students across all programs have the opportunity to gain hands-on experience as part of their studies.
- Mount Saint Vincent is a leader in online/distance education, with more than 275 courses (undergraduate and graduate) offered online and via distance learning.
- The school has more than 100 ongoing research partnerships with business and community organizations.

NOVA SCOTIA COMMUNITY COLLEGE (NSCC)

Halifax also is home to three campuses of the Nova Scotia Community College, which offers an array of more than 120 programs in five academic schools—Access, Business, IT & Creative Industries, Health & Human Services, and Trades & Technology.

- 24,000 students
- There are six distinct IT diploma programs at NSCC including: Data Analytics, Database Administration, Generalist, Programming, Systems Management & Security, and Web Development.
- NSCC's IT program currently graduates more than 130 students each year, and has intentions

to at least double that number in the next two to three years, with the possibility of expanding further through both core and customized training. An event as significant as the selection of Halifax for Amazon's HQ2 would provide the impetus for far greater and faster expansion.

- NSCC also has an Advanced Diploma in Business Intelligence Analytics. This program focuses on analytics gathering/presenting and the resulting decision-making opportunities such data represents.
- In 2018, NSCC will begin offering a Cyber Security diploma program to meet the increasing need for those able to navigate the ever-increasing cyber security needs of all industries.
- NSCC offers a Digital Animation program with concentrations in both 2D and 3D Animation, along with the Game Development program with concentrations in 3D Modeling & Motion Capture.

SMALLER UNIVERSITIES FILLING NICHES IN THE EDUCATIONAL LANDSCAPE INCLUDE:

- University of King's College (affiliated with Dalhousie), known for its interdisciplinary programmes in the humanities and journalism.
- Nova Scotia College of Art and Design, which offers areas of specialization in animation, art history, ceramics, drawing, fashion, filmmaking, film studies, fine art, interdisciplinary design, intermedia, jewellery design and metalsmithing, photography, and textiles.
- Atlantic School of Theology, helping to develop post-graduate students ready to meet the theological and ethical challenges of today's world.

Post-Secondary Enrollments, 2014-15 School Year

Category	Halifax	Nova Scotia	Eastern Canada	Canada
Technical/Professional	4,668	9,726	27,573	586,593
<i>Share</i>	12.8%	17.6%	23.5%	28.5%
Undergraduate	25,358	36,639	55,557	1,109,445
<i>Share</i>	69.7%	66.4%	47.4%	54.0%
Graduate	5,635	7,131	13,473	213,756
<i>Share</i>	15.5%	12.9%	11.5%	10.4%
Other	734	1,707	20,634	145,146
<i>Share</i>	2.0%	3.1%	17.6%	7.1%
Total	36,395	55,200	117,240	2,054,943

Sources: Maritime Provinces Higher Education Commission (MPHEC): Enrollment. Statistics Canada: CANSIM 477-0019, CANSIM 477-0029. Nova Scotia Community College (NSCC) Data Requests.

EDUCATION AND INDUSTRY PARTNERSHIPS

Industries in Halifax often partner with our post-secondary institutions to undertake research and development. The majority of our universities and the Nova Scotia Community College have industry liaison offices specifically to facilitate these partnerships. Groups such as the Industrial Liaison and Innovation (ILI) at Dalhousie University, the Office of Innovation and Community Engagement (OICE) at Saint Mary's University and Nova Scotia Community College's Customized Learning Office are focused on fostering and facilitation industry partnerships for R&D and educational program creation.

For example, Nova Scotia's post-secondary institutions and IBM Canada have partnered to create a hub of learning and research to provide students and companies with a competitive advantage in an emerging and fast-growing area within the IT sector. The project is known as "CARET" (Collaboration for Analytics Research, Education and Technology).

Select Post-Secondary Enrollments, by Field of Study, 2014-15 School Year

Field of Study	Halifax	Nova Scotia	Atlantic Canada	Canada
Social Sciences	4,303	6,471	12,255	276,213
Business & Public Administration	6,486	11,655	21,789	377,931
Physical Sciences	2,306	5,772	11,277	133,062
Mathematics & Computer Sciences	1,082	1,695	3,735	66,207
Architecture & Engineering	2,786	6,078	15,714	216,066
Health Fields	4,427	7,692	15,618	251,874
Total	21,390	39,363	80,388	1,321,353

Sources: Maritime Provinces Higher Education Commission (MPHEC): Enrollment. Statistics Canada: CANSIM 477-0019, CANSIM 477-0029. Nova Scotia Community College (NSCC) Data Requests.

Select Post-Secondary Degrees, 2013-2015

	Degree type	Architecture, engineering, and related technologies			Business, management, and public administration			Mathematics, computer and information sciences		
		2015	2014	2013	2015	2014	2013	2015	2014	2013
Dalhousie University	Undergraduate	407	455	428	465	493	397	113	102	77
	Graduate	258	272	234	223	244	205	101	93	117
Mount Saint Vincent University	Undergraduate	0	0	0	201	191	141	9	8	7
	Graduate	0	0	0	0	0	0	0	0	0
Saint Mary's University	Undergraduate	7	0	2	527	565	547	21	23	25
	Graduate	0	0	0	223	220	244	0	0	0
Other Nova Scotia Universities	Undergraduate	103	57	63	586	529	537	51	49	39
	Graduate	0	0	0	64	45	50	8	10	2
Universities in New Brunswick and Prince Edward Island	Undergraduate	304	313	328	764	793	783	106	95	79
	Graduate	86	87	76	192	285	232	51	34	43

Source: Maritime Provinces Higher Education Commission (MPHEC).

There are several fields that may be valuable to Amazon Halifax HQ2 as it pursues a new headquarters operation. In addition to social scientists, accountants, business students, and mathematicians, some fields such as health sciences and bioinformatics may be relevant. To the left is a selection of the sizes of most of these departments in post-secondary institutions across the city, the province, and in the broader Canadian labor market.

Furthermore, the table to the left provides the number of undergraduate and graduate degrees granted for the last three years of available data for fields of study of most interest to Amazon. In addition to presenting data for Halifax-based schools—Dalhousie University, Mount Saint Vincent University, and Saint Mary's University—data are presented for other universities in Nova Scotia and for the other Maritime provinces, all of which are within a relatively short drive of Halifax.

Another noteworthy point with regard to Halifax's post-secondary institutions is that in recent years, the number of international students studying here has increased dramatically. Beginning in 2009, international enrollments at Halifax universities began to rise rapidly, growing from 2,800 to almost 6,000 by 2015. Halifax has had an average growth rate in international student enrollments of 10.1% since 2000.

K-12 EDUCATION

With regard to K-12 education in Halifax, unique high school offerings include: Business Technology, Exploring Technology, Computer Programming, Film and Video Production, Multi Media, Communications Technology, Production Technology, Leadership, Applied Networking Technology, Business Management, and Entrepreneurship. Five high schools offer International Baccalaureate (IB) programs; six high schools offer advanced placement (AP).

Coding is part of the Grades Primary to 6 curricula and will be introduced into the Grades 7–9 curricula during the 2017–2018 school year.

In partnership with Brilliant Labs, 25 schools have Makerspaces. These spaces are creative, technology-enhanced learning areas that offer students an opportunity to create and collaborate on coding and robotics, and develop an entrepreneurial mindset.

Labor costs

Halifax offers labor costs that are significantly lower than most North American centers. Labor will comprise 80-90% of the costs associated with the operation of Amazon's HQ2, which makes Halifax particularly competitive compared to other North American jurisdictions. The Economic Research Institute's Salary Assessor tool was used to compare median salaries across comparison jurisdictions for five key roles across a range of experience levels. Halifax exhibits a clear cost advantage.

"IBM on a global basis measures staff retention rates, and I'm proud to report that every quarter since we've opened we've won that. We have had the highest staff retention rate of anywhere in IBM on a global basis."

– Chris MacIntosh, Centre Leader IBM Client Innovation Centre: Nova Scotia

LOYAL WORKFORCE

Halifax and Nova Scotia have a reputation for job loyalty. A survey earlier this year measured hiring pressures in roles important to the growth of the province's tech industry. Across seven types of roles—finance and accounting, human resources, procurement/supply chain, digital services (including graphic designers), computer/information systems/database analysts, IT infrastructure, and IT application development (software engineers)—annual attrition rates ranged from a low of 4.9% to a high of 14.4%.

These figures are in stark contrast to American attrition data compiled by the Bureau of Labor Statistics, as shown to the right. Note that in five years of data across five industry sectors, the attrition rate never falls below 23%. This type of labor loyalty and stability provides another significant cost advantage to Halifax operations.

The table below provides average hourly wage data for a variety of selected occupations that will be of interest to Amazon across an expanded list of North American comparator cities. Among these 17 cities, Halifax has the lowest cost of labor for every position. In some cases, the cost of labor in Halifax is less than one-third that of other cities. Across occupations, the average Halifax "discount" ranges from 21% (supply chain logistics co-ordination) to 51% (user support technicians).

Average Full-Time Hourly Wages

Select Occupations	Administrative services managers	Managers in financial services	Computer systems managers	Supply chain logistics co-ordination	Programmers and media developers	Computer network technicians	User support technicians	Systems testing technicians
Halifax	\$27.24	\$26.40	\$26.36	\$16.08	\$23.96	\$21.64	\$12.60	\$21.00
Calgary	\$34.44	\$37.44	\$37.60	N/A	\$32.48	\$27.40	\$29.68	\$22.32
Kitchener-Waterloo	\$29.00	\$33.36	\$33.84	\$16.20	\$27.52	\$28.36	\$25.44	\$29.72
Montreal	\$34.80	\$36.60	\$36.52	\$17.72	\$26.48	\$28.24	\$19.56	\$25.12
Ottawa	\$32.12	\$31.36	\$37.68	\$16.12	\$33.32	\$30.16	\$20.00	\$21.68
Toronto	\$35.00	\$36.56	\$36.36	\$17.72	\$29.76	\$24.36	\$21.04	\$30.88
Vancouver	\$36.08	\$33.84	\$30.96	\$17.76	\$33.12	\$26.24	\$18.80	\$28.12
Atlanta	\$47.19	\$71.48	\$67.22	\$20.68	\$42.95	\$35.55	\$26.76	\$27.43
Boston	\$55.20	\$74.20	\$76.76	\$23.38	\$49.26	\$41.48	\$32.59	\$34.42
Charlotte	\$55.70	\$76.68	\$71.00	\$19.90	\$45.51	\$27.94	\$27.11	\$27.62
Chicago	\$44.84	\$65.05	\$67.33	\$24.16	\$40.62	\$35.05	\$27.04	\$32.84
Dallas	\$58.00	\$75.76	\$77.73	\$21.70	\$44.98	\$40.66	\$26.91	\$30.06
Denver	\$54.49	\$80.42	\$79.20	\$22.96	\$47.30	\$33.27	\$30.09	\$34.77
Minneapolis	\$45.58	\$72.18	\$70.46	\$19.93	\$43.89	\$30.66	\$27.62	\$30.84
Philadelphia	\$55.22	\$83.83	\$78.26	\$24.46	\$41.31	\$34.48	\$28.41	\$30.32
Seattle	\$58.67	\$70.02	\$77.43	\$23.34	\$59.54	\$38.22	\$29.46	\$34.16
Washington, DC	\$53.33	\$77.20	\$80.52	\$25.35	\$47.66	\$39.81	\$29.73	\$35.34

Sources: US Bureau of Labor Statistics: May 2016 Metropolitan and Nonmetropolitan Area Occupational Employment and Wage Estimates; Statistics Canada, CANSIM Table 285-0050, Job Vacancy and Wage Survey.

Attrition Rates in the United States by Industry

Industry	2012	2013	2014	2015	2016
Information	28%	30%	32%	34%	33%
Financial activities	27%	30%	28%	27%	26%
Finance and insurance	23%	26%	25%	25%	23%
Real estate and rental and leasing	38%	39%	36%	35%	34%
Professional and business services	56%	57%	60%	62%	63%
Halifax IT Sector	4.9% to 14.4%				

Source: US Bureau of Labor Statistics, Corporate Research Associates 2017 ICT Labor Force Study.

Nova Scotia's immigration advantage

Canada's doors are open to immigrants, particularly to highly skilled and educated workers and those recruited by Canadian employers to fill labor market gaps. In an increasingly protectionist era, Canada's immigration laws and policies are very progressive. Employers across Canada benefit from immigration programs adopted to foster innovation and investment in the economy under Canada's Global Skills Strategy and international agreements.

Canadian firms can now access the skill and talent of workers from around the world more easily because of new immigration programs including:

- Two-week processing times for certain work permit categories
- Work permit exemptions for highly skilled workers on short-term work assignments and researchers involved in short-duration research projects
- A dedicated service channel for companies looking to make large, job-creating investments in Canada

- Facilitated business visitor and work permit categories for citizens of European Union member states under the Comprehensive Economic and Trade Agreement (CETA)

Nova Scotia offers many additional immigration advantages through some novel pathways not available elsewhere. Employers based in Nova Scotia can leverage the Nova Scotia Nominee Program and the Atlantic Immigration Pilot to attract and retain skilled international talent.

NOVA SCOTIA NOMINEE PROGRAM

Each province in Canada has a nominee program under which prospective immigrants with particular skills and experience needed in a particular region can be sponsored by that province. Nova Scotia's provincial nominee program offers some of the most unique nominee streams available in the country, including an entrepreneur stream for international graduates and the Nova Scotia Demand stream which targets highly skilled individuals wanting to settle in Nova Scotia.

The long-standing Skilled Worker stream is an employer-supported program that provides additional flexibility for Nova Scotia. The Nova Scotia Nominee Program also has accessible management who are available to liaise and work with employers.

ATLANTIC IMMIGRATION PILOT

A creative pilot initiative was launched in March to help employers in Eastern Canada hire (and retain) foreign skilled workers and international students. The Atlantic Immigration Pilot (AIP) includes a program that specifically targets international graduates who have completed post-secondary education in Atlantic Canada, and two other programs that facilitate hiring foreign nationals in high and intermediate-skilled positions. The pilot programs offer a permanent rather than just a temporary pathway to obtaining permanent immigration status in Canada. To become a designated employer under the AIP, employers commit to supporting the settlement and retention of employees who come to Canada through the AIP.

OTHER IMMIGRATION ADVANTAGES IN NOVA SCOTIA

The Government of Canada's immigration department has an employer liaison network staffed by knowledgeable officers whose job it is to help Canadian employers learn how the immigration system can be leveraged to support hiring needs and drive economic growth. The Employer Liaison Officer responsible for the east coast is based in Halifax.

Halifax's proposed hiring strategy for Amazon

Amazon's HQ2 in Halifax will draw on several sources to supply its talent. The city has a highly educated and skilled population, including a significant number of workers in the occupations likely to be most needed by Amazon.

As a regional center for higher education, Halifax is in the fortunate position of having a steady stream of university and college graduates entering the local workforce. Beyond the municipal borders, there are many other educational institutions within a short distance throughout the region. Students from these schools tend to think of Halifax first when looking for career opportunities upon graduation.

An initial examination of Amazon's hiring needs, existing labor forces, post-secondary enrollments, and immigration patterns suggests that the hiring schema depicted here would leverage Halifax's assets. Our rough projections suggest that just over half of IT positions and close to two-thirds of non-IT positions would be filled from the local labor market and educational institutions plus direct immigration to Halifax, with the remainder coming from other parts of Nova Scotia and the rest of Canada as workers gravitate towards the Amazon HQ2 opportunity.

By leveraging multiple avenues for attracting talent, Amazon's Halifax HQ2 would be able to grow along with the city. This will allow Amazon to benefit from the many other advantages of locating in a city the size of Halifax.

Amazon Halifax HQ2 Proposed Hiring Strategy

IT HIRES

Talent Source	Halifax	Nova Scotia	Eastern Canada	Canada	Total
Current non-IT Supply	3%	1%	0%	0%	4%
Current core IT Supply	20%	5%	10%	20%	55%
New Grads (IT FoS)	10%	1%	5%	5%	21%
New Grads (non-IT FoS)	0%	0%	0%	0%	0%
Immigration	15%	n/a	n/a	n/a	15%
Intercompany Transfers	5%	n/a	n/a	n/a	5%
Total	53%	7%	15%	25%	100%

NON-IT HIRES

Current non-IT Supply	20%	5%	5%	5%	35%
Current core IT Supply	0%	0%	0%	0%	0%
New Grads (IT FoS)	0%	0%	0%	0%	0%
New Grads (non-IT FoS)	20%	10%	5%	5%	40%
Immigration	20%	n/a	n/a	n/a	20%
Intercompany Transfers	5%	n/a	n/a	n/a	5%
Total	65%	15%	10%	10%	100%

Source: Nova Scotia Business Inc.

Case Study | DR. JEFF DAHN & TESLA

Dalhousie University is training a new generation of scientists who are at the forefront of dynamic technology.

Unlocking the potential of renewable energy is essential to a sustainable, prosperous future for our planet. And Dalhousie University's Dr. Jeff Dahn has discovered a set of keys.

For more than 35 years, Dr. Dahn has been at the forefront of research and innovation in battery technology. Through a mixture of fundamental and applied research, the work of his team can be found in lithium-ion rechargeable batteries used in power tools, electric vehicles and other devices around the world today.

Dr. Dahn is the most recent winner of the Natural Sciences and Engineering Research Council's (NSERC) Herzberg Canada Gold Medal, a prestigious award honoring his innovations in the area of batteries and energy storage. His is just one success story from a research community on a roll. Three of the past four Herzberg recipients have been Dalhousie faculty—a very rare feat in the 20-plus year history of the award.

A NEW ERA OF INNOVATION WITH TESLA

Dr. Dahn's global leadership in lithium-ion battery research also earned him the inaugural Governor-General's Innovation Award and resulted in an

exclusive partnership with Tesla to advance a worldwide transition to sustainable energy. Tesla—which aims to not only improve electric vehicles, but “accelerate the world's transition to sustainable energy”—signed on to a five-year exclusive collaboration with Dr. Dahn's lab, focused on increasing the lifetime, decreasing the cost, and improving the energy density of lithium-ion batteries. This is Tesla's first university partnership.

EMPOWERING A FUTURE GENERATION OF SCIENTISTS

Dr. Dahn's legacy also lives through his collaboration with students. He is teaching and training future generations of scientists, providing a foundation for students to learn and work at the cutting edge of an exciting field with access to top tier industrial collaboration around the world. Over the years, Dr. Dahn has trained over 50 PhDs and 20 to 25 postdocs. Virtually all of them, including Novonix founder Chris Burns, have gone on to careers in the battery materials or lithium-ion battery space. Dr. Dahn sees a better future for how we power our planet, and it's a sustainable future he and his students are helping to build.



Case Study

IBM SURPASSES GROWTH PROJECTIONS IN HALIFAX

"We created a partnership with six Nova Scotia higher education institutions to support skill development for transformative projects that are now underway. We are more than a year ahead of our estimated hiring target, and this is largely due to the right mix of talent and education in this province."

– Claude Guay, General Manager, IBM Canada Global Business Services

IBM has become an integral part of Nova Scotia's tech industry. In 2012, the company chose Halifax for its first Canadian Client Innovation Centre (CIC), which has become part of IBM's global network of delivery centers that span over three dozen countries, employing thousands of service professionals.

IBM projected the creation of 500 jobs over an eight-year period. Today, the company has been hiring well ahead of the estimated timeline target and plans to create 250 additional positions. IBM and Nova Scotia Business Inc. (NSBI), the business development agency for Nova Scotia, have signed an amended investment incentive agreement over an existing eight-year term in which IBM would be eligible to earn up to \$22,633,683 (CAD), including this new extension of maximum job creation.

"There is no question that Nova Scotia will be key to our first Canadian Global Delivery Center's long-term success. Their talent and technology, innovative partnering, and competitive market profile make a winning combination," said John Lutz, Former President, IBM Canada.

Nova Scotia has a globally recognized culture of innovation that leading IT companies are leveraging. From start-ups, to big IT players, to post-secondary institutions, Nova Scotia has the workforce, expertise, innovation, and investment to play a key role in big data.

"Nova Scotia offers several key advantages including competitive operating costs, financial incentives, world-class infrastructure and a mix of established firms, resulting in a well-connected global cluster," said Laurel Broten, President & CEO, Nova Scotia Business Inc.

PARTNERING TO GROW COMPANIES

Nova Scotia's post-secondary institutions work closely with companies, like IBM, to ensure graduates have the necessary skills to succeed in tomorrow's economy.

Nova Scotia produces more post-secondary graduates per capita than any other province, offering IT companies access to the highest number of post-secondary graduates in engineering, applied sciences, mathematics, and physical sciences per capita compared to any other province in Canada.





HALIFAX STORIES:

Adam Cornick

OCCUPATION:

Photographer

📷: [acorn_art_photography](#)

My wife is Canadian and lived with me in the UK for many years before deciding she wanted to move home to Canada. Having lived near the ocean my whole life and the two of us being keen surfers, we wanted to find somewhere to live with good job prospects and surf beaches close by. A little bit of research later and we booked a trip to spend a few days in Halifax to see if it could be somewhere to set up our new lives. We rented a car and did some exploring and the landscape photographer/creative side of me knew we had found the right place. Ten years later and we're both working in our dream jobs and we now have two children who were born here and couldn't be happier with our decision to choose Halifax as our home.

BEST THING ABOUT LIVING HERE:

The fact you can jump in your car and drive a few minutes and you're in the country or playing in the ocean is without a doubt my favorite part of living here.



A vibrant outdoor patio scene with people socializing under string lights and greenery. The background shows a modern building with large windows and a balcony with plants. In the foreground, a group of people are gathered around a wooden table, smiling and talking. A man in a blue patterned shirt is on the left, a woman in a blue dress is in the center, and a man in a dark shirt is on the right. A glass of beer is on the table. The overall atmosphere is warm and inviting.

5.

**IT'S A FACT:
HALIFAX MAKES PEOPLE HAPPY**

**It's a compelling story.
A centuries-old city by the
sea with a vibrant culture,
populated by creative,
well-educated people
from all over the world.**



LIFE IN HALIFAX

Affordable real estate. Low crime rates. Beautiful urban parks and trails and an array of educational opportunities for learners of every age. Art, theater, music, restaurants, and craft breweries. We enjoy a rare and wonderful quality of life in Halifax. We want to share it with you.

There are few places in the world where you can get from the boardroom to the beach in less than 30 minutes. Halifax is one of them.

Our enviable combination of urban amenities and rural, natural beauty offers an exceptional quality of life for current and prospective residents and businesses.

There are countless events and activities that are within walking distance of the city core or a short drive away. Idyllic locations such as Queensland and Lawrencetown Beaches are accessible to those looking for a swim. There are skating rinks, pools, tennis courts, gyms, and many other recreation facilities that have both free and paid activities for all ages.

One of the more popular amenities in Halifax is the Emera Oval, the largest outdoor, artificially-refrigerated ice surface in Eastern Canada. Free skate rentals are available in the winter and free rollerblade rentals are available in the summer so people can skate year-round.

For those looking for a place to relax, there are 894 parks in Halifax, which include the Halifax Commons, the Halifax Public Gardens, and Point Pleasant Park. Halifax is also home to one of the world's longest boardwalks that features the Halifax Seaport Farmers Market, the Canadian Museum of Immigration at Pier 21, the Maritime Museum of the Atlantic, and numerous shops and restaurants.

Halifax prides itself on supporting locally sourced foods. This culture has helped Halifax boost the “farm-to-table” movement, local wineries and the craft beer industries. Luckett’s Winery has partnered with local wineries and farmers to create wine tours with local dishes at each stop. There is also a “Craft Beer Bus” that takes participants to four different craft breweries where participants can sample pints and pair them with locally sourced foods.

These collaborations have also led to Nova Scotia wine being exported world-wide, and to Nova Scotia having the most craft breweries per capita in Canada. Downtown Halifax has embraced this culture and business owners have based their restaurants and shops around these local brands. Bars like Stillwell and Lion & Bright source local foods and craft beers, ciders, and wines. Stillwell also built an urban beer garden in the heart of Halifax on Spring Garden Road. There are many businesses like these that embrace the soul of Halifax and create an amazing atmosphere for people to relax and collaborate.

Halifax was one of the first cities to have Burger Week, which features over 100 restaurants showcasing local burgers and beer. There’s also the Halifax Seaport Beer Fest, the largest beer festival

in Eastern Canada, and the Halifax Pop Explosion, a four-day music festival that has headliners from across North America and numerous local indie bands, playing in venues ranging from churches, symphony, and music theaters.

For people looking for arts and culture, Halifax offers up numerous unique events such as the Halifax Urban Folk Festival (HUFF), Nocturne Art at Night, Shakespeare by the Sea, Atlantic Jazz Festival, and Atlantic Film Festival. Locals can pair these events with other activities such as board game cafés, SUP yoga on the ocean, “Dining on the Ocean Floor”, Dîner en Blanc, and other outdoor festivals.

Halifax is also a passionate sports city that supports junior, university, and development sport leagues. Halifax is home to the Halifax Mooseheads, a Quebec Major Junior Hockey League team and the Halifax Hurricanes, a member of the National Basketball League (NBL). Both teams play at the Scotiabank Centre which has a capacity of 11,093.

Halifax will be welcoming the Canadian Premier League in 2018, a new league approved by Canada Soccer. The team will have a 7,000-seat stadium and host 10 regular season games during the league’s first season in 2018.

Known for its exceptional hospitality, Halifax is a destination to host large sporting events. Upcoming is Canada's FIBA Basketball World Cup Qualifier game on November 24th, 2017. As well, Halifax annually hosts the Atlantic University Sport (AUS) Men's and Women's Basketball Championships.


Halifax was home to the Web.com NS Open in 2015 and hosted the Davis Cup in 2015 and 2016.



HALIFAX STORIES:

Doug Townsend & Renée Lavallée

OCCUPATION: Restaurateurs

 [thecanteenns](#)

Doug: I was born and raised in Halifax, and I loved it. Great neighborhoods, awesome recreational activities, outdoor sports, sailing and more. After I graduated from Dalhousie University with a business degree, I considered leaving and living abroad. Thankfully, I had some great job opportunities, and I've been living here ever since. Halifax saw me get married, have two kids, and build a business with my wife. I couldn't imagine living anywhere else.

Renée: I moved to Halifax more than 12 years ago. As a chef, this city has provided me with tremendous opportunities, working in some amazing restaurants. I have access to some of the best seafood and agricultural products in the world, and my incredible community supported me as I opened my own restaurant. Being a professional chef, I have had the opportunity to work all over the world, but my love affair with Halifax has kept me and my husband right here.

BEST THING ABOUT LIVING HERE:

We have all the amenities that major cities offer without the drawback of big city life. We love the affordable cost of living, how easy it is to get around the city, and the amazing beaches. Halifax is a wonderful place to raise a family. Our children have opportunity to be part of a close-knit community with great people, and already understand why we're so fortunate to live in this part of the world.



Affordable, beautiful place to live

Halifax's combination of housing options, affordable tuition, and countless recreation activities make it an attractive city. The city's laid-back east coast lifestyle and charm increases businesses' and families' desires to establish roots.

As shown below, Halifax's average home price¹ is less than half that of the cost in Boston, Seattle, Toronto, or Vancouver. Employees who relocate to Halifax will arrive with significant equity after selling their homes. This additional equity gives Amazon a major recruiting tool.

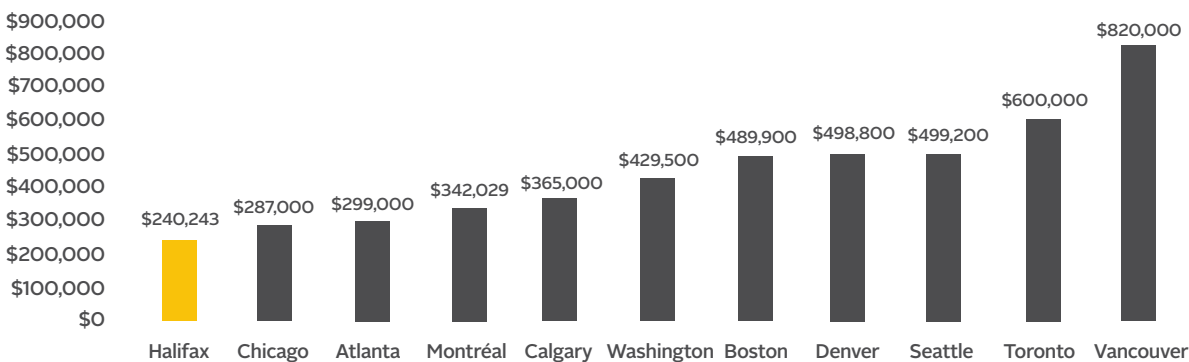
Current Amazon employees transferring from other locations, and new Amazon employees who are relocating for a new HQ2 position in Halifax, will have the flexibility to accelerate their retirement

savings, lower their personal debt levels, or create investment opportunities for themselves in the local real estate market.

Halifax offers excellent housing options at costs considerably lower than many other North American cities. Apartments and condominiums are available for young professionals who prefer to live within walking distance to work, as are larger homes with backyards for families, and high-end luxury accommodations in the heart of Halifax for senior-level employees.

The median rent for a 1-bedroom apartment in Halifax is \$636. This is about one-third of the rate for an apartment in Boston.

Home Prices, USD July 2017



Sources: CMHC Housing Now Tables August 2017 & US Realtor Research: <https://research.realtor.com/data/inventory-trends/>
¹Canadian city prices are listed in average resale home price and American city prices are listed as median home prices, due to data availability.

The Alexander

Is one of many brand new modern residential buildings located downtown close to Halifax's waterfront. It is a luxury apartment building with numerous on-site retailers and a Walk Score of 96. Rental rates begin at \$1,000, half that of Seattle.



Quality education for less

Halifax has one of the highest post-secondary education attainment rates in Canada with 70% of those aged 25-64 having at least some post-secondary education and 37% of this age group having attained a university degree or certificate.

Halifax offers competitive education costs compared to most cities in North America. For the 2017-2018 school year, Nova Scotia residents paid \$6,181 per undergraduate tuition, lower than the US average of \$9,650. International students only have to pay an average of \$13,409 per year in Nova Scotia compared to the Canadian average for international students of \$20,144, and US average of \$24,930. Comparing “flagship” public universities, Dalhousie University offers significant cost savings for international students.

Comparative community college tuition rates are shown in the graph below. NSCC is significantly more affordable than most of the other jurisdictions, which is impressive given its wide range of programs compared to other Canadian public colleges.

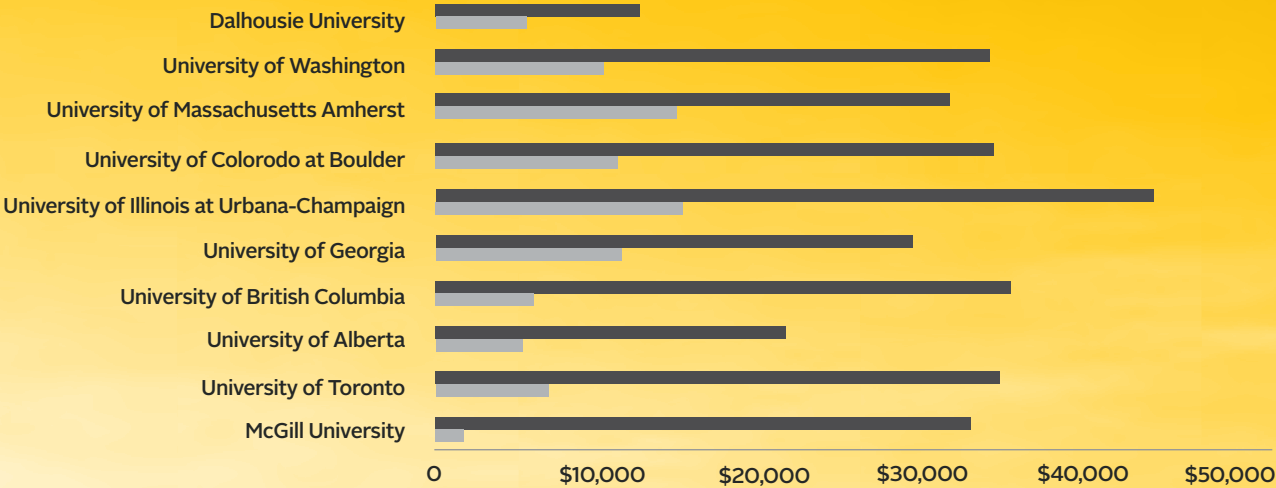
Two Year Community College Tuition Rates



Sources: Various Canadian Community College Organizations and US www.collegedata.com
*Quebec and Alberta were excluded due to data limitations

Tuition Rates Domestic vs International Students

International Domestic



Sources: Various Canadian University Websites and www.collegedata.com

A black and white portrait of Marc Almon, a man with a beard and short hair, wearing a dark peacoat over a patterned scarf. He is standing outdoors, leaning against a railing, with a blurred background of trees and a building. The image is framed by yellow geometric shapes in the corners.

HALIFAX STORIES:

Marc Almon

OCCUPATION:

Filmmaker

I was born and raised here. I lived in Toronto for a while as I attended film school, but always wanted to return to the East Coast. I ended up moving back to Halifax to produce my first feature film, which ironically won Best First Feature at the Toronto International Film Festival. I have continued making movies and being a part of Halifax's vibrant arts community ever since.

BEST THING ABOUT LIVING HERE:

It's a walking and cycling paradise. I live and work on peninsular Halifax, and everything I need and love to do is accessible to me within a fifteen minute bicycle commute, whether it's attending a meeting downtown or going to Point Pleasant Park for some relaxation time. It's a beautiful privilege that I'm grateful for.

Neighborhood options

In Halifax, people can live and work in more than 200 rural, urban, and suburban communities. The following neighborhoods are examples of communities high-tech workers and other professionals in Halifax call home today, all within the commuter shed of the city.

HYDROSTONE, HALIFAX

Professional/family neighborhood, built as an English style garden suburb in the core of the city after the Halifax Explosion of 1917.

THE NEIGHBORHOOD

- Row houses with laneways and single detached homes
- Modest to moderate scale lots
- Early 1900s to contemporary
- New multi-unit apartment/condo
- Average home price: \$309,200

5 MINUTES OR LESS ACCESS (WITH A VEHICLE)

- Seaside parks and beaches
- Public and private recreational facilities
- Specialty urban retail, micro-breweries, commercial main streets, and farmers' markets

10 MINUTES OR LESS ACCESS (WITH A VEHICLE)

- Downtown Halifax
- 3 mile, 7 minute drive to Shannon Park (or 30 minute bus ride)
- Universities and community college (Dalhousie University, Saint Mary's University, Mount Saint Vincent University, Nova Scotia Community College)

20 MINUTES OR LESS ACCESS (WITH A VEHICLE)

- Provincial parks and hiking trails
- Public and private aquatic recreational facilities and lakes





CRICHTON PARK, DARTMOUTH

Family focused lakefront neighborhood

THE NEIGHBORHOOD

- Single detached
- Small to moderate lot size
- 1940s to contemporary
- Average home price: \$220,000

COMMUTE TIMES TO SITE

- 3 mile, 10 minute drive to Shannon Park (30 minute bus ride)

5 MINUTE ACCESS (WALKING)

- Lakeside parks and beaches
- Urban recreational facilities
- Rowing, boating

**5 MINUTES OR LESS ACCESS
(WITH A VEHICLE)**

- Oceanfront and lakeside parks and beaches
- Urban recreational facilities
- Downtown Dartmouth

**20 MINUTES OR LESS ACCESS
(WITH A VEHICLE)**

- Provincial parks, golf course
- Lakeside parks and beaches
- Universities (Dalhousie University, Saint Mary's University, Mount Saint Vincent University)

WEST END, HALIFAX

Central estate neighborhood

THE NEIGHBORHOOD

- Single detached
(limited direct ocean front/view)
- Moderate to large lots
- Early 1900s to contemporary
- Average home price: \$336,800

COMMUTE TIMES TO SITE

- 5 mile, 15 minute drive to Shannon Park (or 45 minute bus ride)

**5 MINUTE OR LESS ACCESS
(WALKING)**

- Seaside and neighborhood parks and beaches
- Shopping centers
- Commercial main streets (Quinpool)

**5 MINUTES OR LESS ACCESS
(WITH A VEHICLE)**

- Halifax Shopping Centre and other commercial super centers
- Downtown Halifax
- Golf course
- Universities (Mount Saint Vincent University, Dalhousie University, Saint Mary's University)

**20 MINUTES OR LESS ACCESS
(WITH A VEHICLE)**

- Provincial parks
- Public and private recreational facilities, sailing, and additional golf courses





BEDFORD WEST

Contemporary community

THE NEIGHBORHOOD

- Town house, single detached
- Small to moderate lot size
- Contemporary
- Average home price: \$284,000

COMMUTE TIMES TO SITE

- 10 mile, 20 minute drive to Shannon Park (60 minute by bus)

**5 MINUTES OR LESS ACCESS
(WITH A VEHICLE)**

- Oceanfront and lakeside parks and beaches
- Urban recreational facilities
- Sailing, rowing, boating, and golf

**20 MINUTES OR LESS ACCESS
(WITH A VEHICLE)**

- International airport
- Wilderness areas for camping, sport fishing, and hunting
- Urban center
- Universities (Mount Saint Vincent University, Dalhousie University, Saint Mary's University)

FALL RIVER

Traditional lakeside community

THE NEIGHBORHOOD

- Single family
- Moderate to large lots
- Late 1900s to contemporary
- Average home price: \$370,100

COMMUTE TIMES TO SITE

- 16 mile, 20 minute drive to Shannon Park (60 minute bus ride)

10 MINUTES OR LESS ACCESS (VEHICLE)

- Park and ride facility
- Lakeside parks and beaches
- Suburban and rural recreational Facilities
- Canoe and kayak
- Wilderness areas for camping, sport fishing and hunting
- International airport





LAWRENCETOWN

Seaside community

THE NEIGHBORHOOD

- Single detached
- Moderate to large lots, acreages
- Average home price: \$203,200

COMMUTE TIMES TO SITE

- 17 mile, 30 minute drive to Shannon Park (75 minutes by bus via Porters Lake Transit Terminal)

DIRECT ACCESS TO

- Provincial park and various other beaches with internationally renowned surfing within walking distance
- Provincial wilderness areas with light to extreme recreation including: camping, hiking, sport fishing, and hunting

AVONPORT, KINGS COUNTY

Rural community

THE NEIGHBORHOOD

- Single detached, farmsteads
- Large lots, acreages
- Average home price: \$205,600

COMMUTE TIMES TO SITE

- 47 mile, 50 minute drive to Shannon Park

10 MINUTES OR LESS ACCESS (VEHICLE)

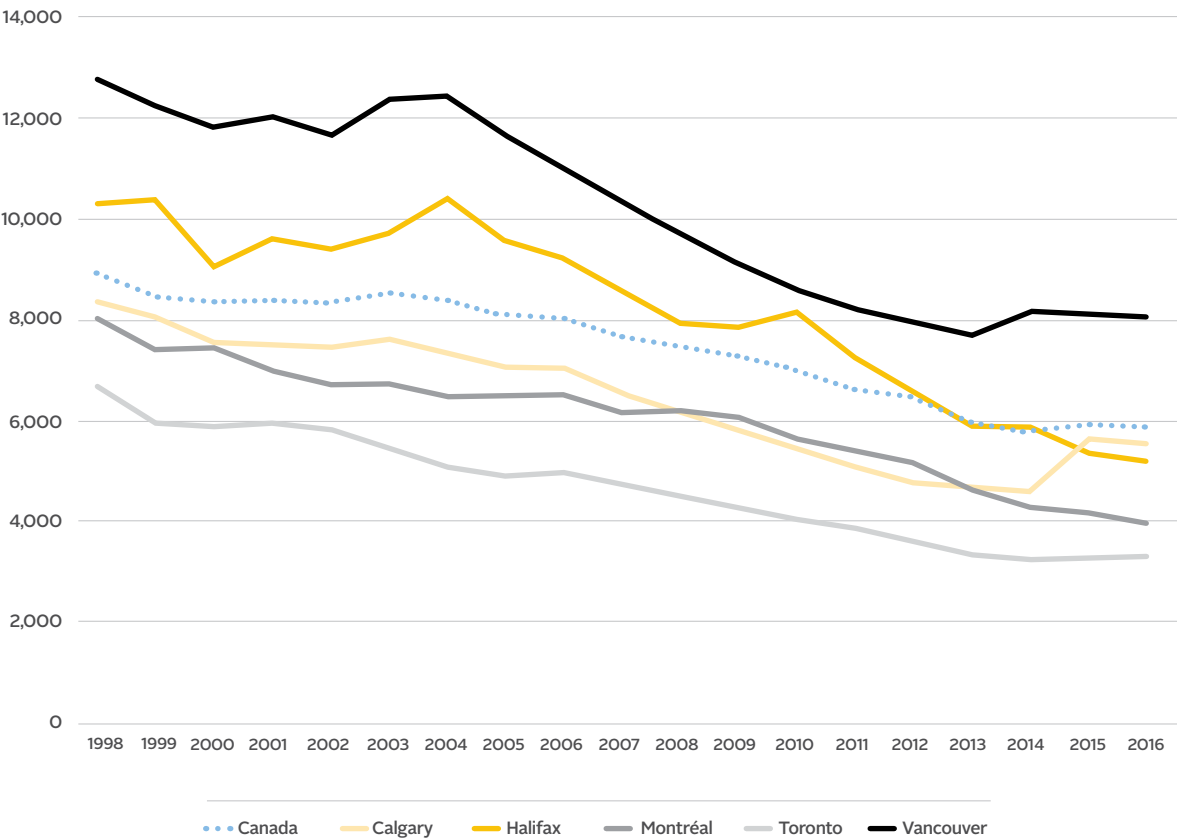
- Local wineries
- Apple, pear, strawberry, pumpkin U-Picks and farmers' markets
- Beaches, seaside provincial parks, hiking trails
- Village center amenities
- Wilderness areas for camping, sport fishing, and hunting
- Acadia University



A safe place to live

Halifax is a safe, family-friendly city that has seen steady long-term declines in its crime statistics. Total violations per 100,000 persons have trended downward since the turn of the millennium. Halifax sits below the national average on this measure. (Directly comparable measures for US cities are not available.)

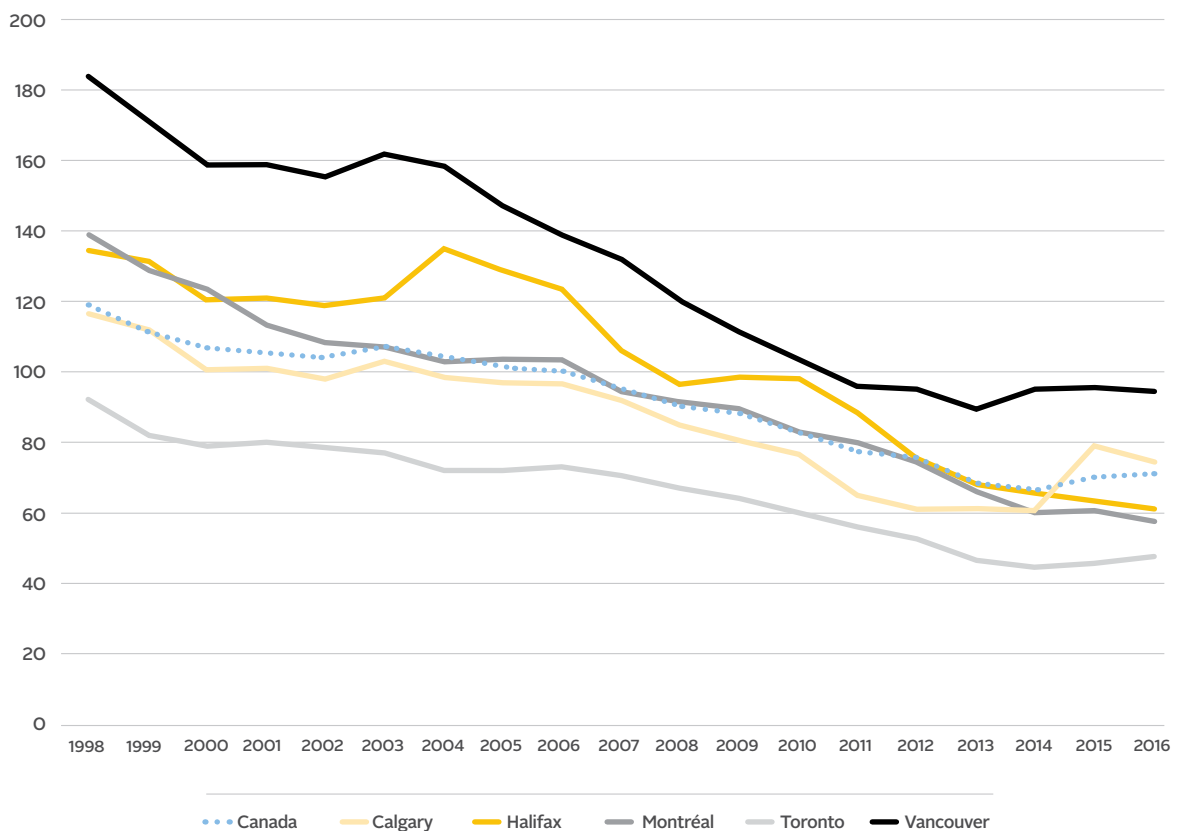
Total Violations per 100,000 Population



Statistics Canada also calculates a Crime Severity Index that incorporates both the incidence of crime and the relative seriousness of individual offences. Again, Halifax has seen a significant, long-term decrease for this measure and sits below the Canadian average.

In 2016 there were only 12 homicides in Halifax. In 12 of the past 19 years homicides were counted in the single digits, with the number never going above 18.

Crime Severity Index (100 = Canada, 2006)



A DAY IN THE LIFE:

Meet Ibrahim from Halifax HQ2

Occupation: Software Engineer
Household: Single Earner
Housing: Rents Downtown, 900 sq. ft.
Transportation: Public Transportation

Lifestyle Cost: SEATTLE \$83,792
Lifestyle Cost: HALIFAX \$57,786

Ibrahim is a recent graduate of Dalhousie University and a second-generation immigrant from Lebanon. He has recently been employed as a software engineer, but still wants to enjoy university life and downtown amenities. Many of his friends still live on and around the Dalhousie University Campus, so he wanted to find an apartment close by with easy access to transit. He is used to late nights cramming for finals, so having Tony's Donair on the corner is a big plus. Ibrahim also used to be on the track team, so having Halifax Commons next door and a fitness room downstairs help him stay in shape.

Spending Factors	Seattle	Halifax
Consumables & Misc Costs	\$14,670	\$16,060
Transportation	\$1,521	\$1,521
Health Services*	\$2,391	\$1,748
Housing/Utilities/Insurance	\$29,832	\$13,412
Income & Payroll Taxes	\$20,493	\$25,045
Total Cost-of-Living	\$83,792	\$57,786

*Health care services reflect the employee's health care costs and carrier zone rates by location along with hospital costs. This does not reflect the difference in Amazon's health plan expenses when employing someone in Seattle or Halifax. As indicated in the Cost Advantage section, it is estimated that in Halifax Amazon would save \$12,000 per employee/year by leveraging Canada's national healthcare system.

Bike Score:
100%

Walk Score:
89%



Monthly Rent:
\$840

Commute time:
24 min via bike
36 min via bus

A DAY IN THE LIFE:

Meet Catherine & Mark from Halifax HQ2

Occupations: Software Engineer (5yr),
Newspaper Journalist (5yr)

Household: 4–Dual Earner, 2 Kids

Housing: Owns 3,200 sq. ft. Home

Transportation: Own 1 Car

Lifestyle Cost: SEATTLE \$158,500

Lifestyle Cost: HALIFAX \$151,680

**Drive Time
to Beach:**
<20 min

Commute Time:
8 min via Car

Catherine is a Software Engineer, born and raised in Dartmouth. She met her husband Mark after he moved to Halifax from Toronto to pursue a career as a Newspaper Journalist. They now have two kids and are looking for a safe, family-friendly suburban neighborhood to raise them. They want a short commute to work, and are an active family. They like to hike, golf, and take the kids to the beach on the weekends—all of which are close to their house. Mark likes that there's a Home Depot and a golf course nearby.

Spending Factors	Seattle	Halifax
Consumables & Misc Costs	\$35,192	\$36,956
Transportation	\$14,983	\$14,950
Health Services*	\$3,848	\$2,708
Housing/Utilities/Insurance	\$79,556	\$41,459
Income & Payroll Taxes	\$24,921	\$55,607
Total Cost-of-Living	\$158,500	\$151,680

*Health care services reflect the employee's health care costs and carrier zone rates by location along with hospital costs. This does not reflect the difference in Amazon's health plan expenses when employing someone in Seattle or Halifax. As indicated in the Cost Advantage section, it is estimated that in Halifax Amazon would save \$12,000 per employee/year by leveraging Canada's national healthcare system.



Real Estate:
\$415,000
4 Bed 3 Bath

**Drive Time to
Golf Course:**
<10 min

**Drive Time to
Shopping Center:**
<10 min

A DAY IN THE LIFE:

Meet Roger & Samantha from Halifax HQ2

Occupation: Software Design Director, responsible for
\$100m in Revenue (25yr)

Household: 2–Single Earner, No Kids

Housing: Rent Urban, 2,336 sq. ft.

Transportation: Owns 2 Cars

Lifestyle Cost: SEATTLE \$189,685

Lifestyle Cost: HALIFAX \$180,765

Roger is a software design director who lives with his wife Samantha. With both kids having left the nest, they took the opportunity of moving to downsize to a one bedroom condominium. Preferring the more luxurious part of the city, they decided on Bishop's Landing. They wanted easy access to the symphony and the theater in downtown Halifax. They really enjoy going to the Halifax Seaport Farmers' Market and the many restaurants in and around downtown.

Commute Time:
15 min via Car

Spending Factors	Seattle	Halifax
Consumables & Misc Costs	\$49,520	\$51,349
Transportation	\$25,462	\$25,406
Health Services*	\$3,852	\$2,711
Housing/Utilities/Insurance	\$67,067	\$29,439
Income & Payroll Taxes	\$43,784	\$71,860
Total Cost-of-Living	\$189,685	\$180,765

*Health care services reflect the employee's health care costs and carrier zone rates by location along with hospital costs. This does not reflect the difference in Amazon's health plan expenses when employing someone in Seattle or Halifax. As indicated in the Cost Advantage section, it is estimated that in Halifax Amazon would save \$12,000 per employee/year by leveraging Canada's national healthcare system.

A couple is seen from behind, sitting on a wooden bench. They are looking out at a waterfront view with mountains in the distance. The scene is bathed in warm, golden light, suggesting sunset or sunrise. The background is a soft, hazy landscape with mountains and water.

Location:
Waterfront View

Monthly Rent:
\$1,520

Amenities:
**Theater, Gallery,
Symphony, Shopping**

Amazon, you're about to do the exceptional.

**All you need is one thing.
Halifax.**

Explore what's possible in a place where outstanding teams can accelerate, invent, and create like never before. See how remarkable things happen when you give great people the greatest place.

Amazon HQ2 could be anywhere.
It should be here.

Welcome home.

APPENDIX

Incentive Details

WORKFORCE PROGRAMS

Payroll Rebate Program

Nova Scotia's payroll rebate is an earned incentive, paid out yearly after a company achieves pre-determined targets. The rebate is a return on a company's eligible gross payroll. It is issued over a set number of years—usually between three and five—and to a set amount. This means that for every dollar a company spends in salaries and benefits, Nova Scotia Business Inc. rebates back a negotiated percentage.

The payroll rebate agreement includes performance targets that a company must achieve in order to receive the rebate, including:

- Number of new positions created
- Average annual salary

For more information:

<https://novascotiabusiness.com/invest/business-development-incentives/payroll-rebate>

Workplace Innovation and Productivity Skills Incentive (WIPSI)

Workplace Innovation and Productivity Skills Incentive provides funding to companies to encourage investment in skills development and certification. It is also designed to help companies adapt to the introduction of new technology and innovative processes, improve productivity, and strengthen international competitiveness.

A company may apply for support toward the cost of the following activities:

- Purchase of training from a formal training institution or qualified external or internal training provider
- Registration, tuition or course fees
- International training
- Management skills development
- Skills development training leading to certification
- Training that supports workplace diversity
- Other skills development and training based on a valid business case

There are different cost-sharing requirements depending upon the size of the business and level of incentive sought.

For more information:

<https://novascotia.ca/programs/workplace-innovation-productivity-skills-incentive/>

Co-op Education Incentive

The Co-op Education Incentive (CO-OP) provides wage assistance to private sector, government-funded, and non-profit organizations offering career-related work experiences for university and community college co-operative students.

Employers pay students a minimum of \$15.00 per hour plus 4% vacation pay. CO-OP will reimburse \$7.50 per hour to a maximum of 40 hours per week. Employers participating in IRAP and SR&ED are eligible for an “R&D Incentive” and may receive up to \$10.00 per hour.

Private sector, government-funded and non-profit organizations are eligible to apply and are required to provide at least one of the following:

- Registry of Joint Stocks number
- CRA Charities number
- A copy of legal documentation/Act of Legislature that identifies how assets will be distributed upon dissolution of the organization

For more information:

<https://novascotia.ca/programs/co-op-education-incentive/>

TAX CREDITS

Scientific Research and Experimental Development (SR&ED) Tax Incentive Program

Companies in Canada that invest in R&D can apply for the SR&ED tax incentives, irrespective of size, industry sector, or field of technology. The SR&ED tax credit and provincial tax credits for R&D are a distinct benefit in addition to corporate tax provisions allowing for full deduction of current R&D expenditures from business income.

The SR&ED tax incentive program provides tax incentives for the direct in-house costs of performing eligible R&D work in Canada. Eligible work includes experimental development, applied research, basic research, and certain types of work in support of the experimental development, applied research, and basic research. This support work includes: engineering, design, operations research, mathematical analysis, computer programming, data collection, testing, and psychological research.

Eligible expenses include: wages and salaries of employees directly engaged in the eligible R&D work, overhead expenditures, and materials. Capital expenditures, including machinery, equipment, and buildings are not eligible for the SR&ED tax incentive, however, capital may be deducted from business income as a depreciation (capital cost allowance) expense.

The SR&ED program also allows for the inclusion of the following expenses:

- Contract expenditures for SR&ED performed on behalf of the claimant
- Salaries and wages incurred by the firm on SR&ED activities conducted abroad
- Overhead costs, which may be calculated by a simple proxy method

These features make Canada's SR&ED program truly one of the most generous and accessible R&D tax incentives in the industrialized world.

For more information: <https://www.canada.ca/en/revenue-agency/services/scientific-research-experimental-development-tax-incentive-program.html>

Nova Scotia Research & Development Tax Credit

This credit offers tax relief to Nova Scotia corporations that incur qualified scientific research and experimental development (SR&ED) expenditures made in Nova Scotia, as defined by the federal Income Tax Act.

The credit is administered by Canada Revenue Agency (CRA) and is claimed in conjunction with federal SR&ED tax credits.

Refunds are available to corporations that incur qualified SR&ED expenditures in Nova Scotia where the corporation has or would have taxable income allocated to the Province:

- Corporations that incur qualified SR&ED expenditures will be eligible for a refund of the tax credit where the tax credit exceeds Nova Scotia tax payable
- The refund amount is equal to the amount of the credit in excess of tax otherwise payable under the Nova Scotia Income Tax Act

For more information: <http://www.novascotia.ca/finance/en/home/taxation/tax101/businessstax/corporateincometax/researchanddevelopmenttax.aspx>

Nova Scotia Capital Investment Tax Credit (CITC)

The Nova Scotia Capital Investment Tax Credit (CITC) is a refundable corporate income tax credit claimed by eligible corporations for capital equipment acquired for use in Nova Scotia on or after January 1, 2015. The capital equipment must be acquired as part of an "approved project".

The rate of the tax credit is 15% of the capital cost of "qualified property" acquired in a taxation year, with a maximum tax credit of \$30 million per "approved project."

The CITC is aligned, but not harmonized with, the federal government's Atlantic Investment Tax Credit (AITC). With certain exceptions, the tax credit is available to corporations in the manufacturing, processing, fishing, farming, logging, storing grain, and harvesting peat sectors.

For more information: <http://www.novascotia.ca/finance/en/home/taxation/tax101/businessstax/corporateincometax/capitalinvestmenttaxcredit.aspx>

Nova Scotia Digital Media Tax Credit

The Digital Media Tax Credit is a refundable tax credit for costs directly related to the development of interactive digital media products in Nova Scotia. It offers a refundable tax credit of up to 48% for costs directly related to the development of interactive digital media products.

For more information: <http://www.novascotia.ca/finance/en/home/taxation/tax101/business/corporateincometax/digitalmediataxcredit.aspx>

Digital Animation Tax Credit

The Digital Animation Tax Credit (DATC) is a refundable tax credit for costs directly related to the development of digital animation in Nova Scotia.

For more information: <http://www.novascotia.ca/finance/site-finance/media/finance/DigitalAnimationTaxCreditGuidelines.pdf>

SUPPORTS TO INNOVATION

Strategic Innovation Fund

The Strategic Innovation Fund allocates repayable and non-repayable contributions to firms of all sizes across all of Canada's industrial and technology sectors. The program has a budget of \$1.26 billion over five years.

The Strategic Innovation Fund's objective is to spur innovation for a better Canada. Specifically, it serves to simplify application processes, accelerate processing, and provide assistance that is more responsive and focused on results.

The program has four Streams, each with its own precise objective:

- **Stream 1:** Encourage R&D that will accelerate technology transfer and commercialization of innovative products, processes and services
- **Stream 2:** Facilitate the growth and expansion of firms in Canada
- **Stream 3:** Attract and retain large scale investments to Canada
- **Stream 4:** Advance industrial research, development and technology demonstration through collaboration between academia, non-profit organizations and the private sector

For more information: <https://www.canada.ca/en/innovation-science-economic-development/programs/strategic-innovation-fund.html>

Atlantic Innovation Fund

The AIF helps Atlantic Canadians develop and bring to market new products and services that lead to market success, help grow strategic sectors, or lead to the creation of research and commercialization partnerships.

For more information: <http://www.acoa-apec.gc.ca/eng/ImLookingFor/ProgramInformation/AtlanticInnovationFund/Pages/AtlanticInnovationFund.aspx>

Innovation Rebate Program

The Innovation Rebate Program provides a rebate of up to 15% to help businesses invest in capital projects that support the development of products and value-added products. The project costs must be between \$3 million and \$15 million to qualify for this rebate.

Nova Scotia Film & Television Production Incentive Fund

STREAM I: INDIGENOUS/CO-PRODUCTION:

- Between 50-100% Nova Scotian ownership and control of production
- A minimum of eight Nova Scotians must be employed in Head of Department positions or acceptable combination
- Receive a base amount of 26% of all eligible Nova Scotia costs
- For shoots where greater than 51% of the principal photography is outside the boundaries of Halifax Regional Municipality, you will receive 2% additional funding
- For shoots of more than 30 days, you will receive 1% additional funding

STREAM II: FOREIGN/SERVICE PRODUCTIONS:

- 50% or less Nova Scotian ownership or control of production
- A minimum of four Nova Scotians must be employed in Head of Department positions or acceptable combination
- Receive a base amount of 25% of all eligible Nova Scotia Costs
- For shoots where greater than 51% of the principal photography is outside the boundaries of Halifax Regional Municipality, you can receive 2% additional funding
- For shoots of more than 30 days, you will receive 1% additional funding

For both streams, you can receive up to 3% additional funding if your production meets the criteria for the Nova Scotia Content Incentive.

For more information: <https://www.novascotiabusiness.com/do-business/film-television-production/nova-scotia-film-television-production-incentive-fund>

Canadian Media Fund

Through our many programs, we support a dynamic environment where creators, producers, broadcasters, and distributors partner to generate content for Canadians and global audiences to enjoy.

For more information: <https://www.cmf-fmc.ca/programs-deadlines/programs>

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